

EUROPEAN ADHESIVES AND SEALANTS MARKET

—— 2019 - 2024 ——

A QUANTITATIVE DEMAND
ANALYSIS AND TREND FORECAST





FEICA

Avenue E. van Nieuwenhuysse, 2
1160 Brussels
Belgium

Tel.: +32 (0)2 896 96 00

E-mail: info@feica.eu

FEICA, the Association of the European Adhesive and Sealant Industry, represents the industry at a European level and works with all relevant stakeholders to create a mutually beneficial economic and legislative environment.



Smithers

Cleeve Road
Leatherhead
KT22 7RU
United Kingdom

Tel.: +44 (0)1372 802 000

E-mail: info@smithers.com

Smithers provides market research, publications, strategic and technical consulting, and testing services to a wide range of industries. Smithers publishes a wide portfolio of market research for the adhesives and sealants industry.

Introduction

This report is the sixth 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 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. Due to the economic downturn in 2009, a concise update was issued in January 2010 to supplement the second report. These are the reports that have been published since 2011:

- Third edition 2010-2013 published in 2011
- Fourth edition 2012-2015 published in 2013
- Fifth edition 2014-2017 published in 2015
- Sixth edition 2019-2024 published in 2019

The aim of this programme is to provide market statistics from an independent source which are updated in regular intervals. The analysis is based on primary research. It consists of market knowledge obtained by direct interviews from the adhesives and sealants industry (formulators, raw material producers, equipment suppliers) and analysed by Smithers.

The geographic scope of the study encompasses Europe, including Western Europe, Central and Eastern Europe (CEE) plus Turkey. The European region is split into 16 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 markets of the latter two regions are analysed in separate companion reports offered by the Adhesive and Sealant Council (ASC).

The market size is defined for the year 2018 and a demand forecast for the period 2019-2024 is also provided. The statistical data are reported in tons and euro currency.

The parameters of the market study are described next.

Report contents

1. Introduction and methodology

2. European overview – key drivers and trends

- 2.1. Introduction
- 2.2. European adhesives and sealants topline trend
- 2.3. Materials supply, availability and pricing
- 2.4. Global regulatory landscape impacting adhesives and sealants
- 2.5. European adhesives and sealants key drivers

3. European adhesive and sealant market by type

- 3.1. Regulatory changes that could impact the adhesive/sealant type
- 3.2. Recent technology changes
- 3.3. Adhesives
- 3.4. Sealants

4. European adhesive and sealant market by end use

- 4.1. Adhesives
- 4.2. Common requirements
- 4.3. Unmet technology needs
- 4.4. Sealants

5. Western Europe Country Analysis

- 5.1. Austria
- 5.2. Benelux Countries
- 5.3. France
- 5.4. Germany
- 5.5. Great Britain
- 5.6. Italy
- 5.7. Nordic Countries
- 5.8. Spain and Portugal
- 5.9. Switzerland
- 5.10. Other West European Countries

6. Central and Eastern Europe (CEE) Countries

- 6.1. Czech and Slovak Republics
- 6.2. Hungary
- 6.3. Poland
- 6.4. Russia
- 6.5. Turkey
- 6.6. Other CEE Countries

Market definitions

(Based upon the harmonised FEICA-ASC-CATIA Classification Manual)

Adhesive Product Categories

Reference is made to the detailed FEICA-ASC-CATIA Adhesives and Sealants Classification Manual summarised below by product categories:

1. Hotmelt adhesives
2. Solvent-based adhesives
3. Reactive adhesives (polymerising)
4. Adhesives based on water-soluble polymers
5. Adhesives based on natural polymers
6. Polymer dispersions and emulsions
7. Other adhesives processes

Adhesive Market Segments

Reference is made to the detailed FEICA-ASC-CATIA Adhesives and Sealants Classification Manual summarised below:

1. Paper, board and related products
2. Building / Construction / Civil engineering / Craftsmen
3. Woodworking and joinery
4. Transportation
5. Consumer / DIY
6. Footwear and leather
7. Assembly Operations / Other

Sealant Product Categories

Reference is made to the detailed FEICA-ASC-CATIA Adhesives and Sealants Classification Manual summarised below by product categories:

1. Silicones
2. Polyurethanes
3. Polysulfides
4. Silane-modified polymers
5. Acrylics
6. Butyls, bitumen and pitch, oil base
7. Other sealants

Sealant Market Segments

Reference is made to the detailed FEICA-ASC-CATIA Adhesives and Sealants Classification Manual summarised below:

1. Construction
2. Transportation
3. Consumer / DIY
4. Assembly Operations / Other

More Information

For more details please visit FEICA's website:

<http://www.feica.eu/information-center/marketreports.aspx>

Geographic Scope

Geographic Markets

The geographic scope of the survey is Europe (Western and selected countries of Central and Eastern Europe) and Turkey. The European market is split into 16 regional markets listed below.

Western Europe Country Focus

- Austria
- Benelux Countries (Belgium, Luxembourg, The Netherlands)
- France
- Germany
- Great Britain
- Italy
- Nordic Countries (Denmark, Finland, Norway, Sweden)
- Spain, Portugal
- Switzerland
- Others (Greece, Ireland, Malta)

Central and Eastern Europe (CEE) Country Focus

- Czech and Slovak Republics
- Hungary
- Poland
- Russia
- Turkey
- Others (summary of the demand generated by the following countries: Albania, Baltic States, Belarus, Bosnia and Herzegovina, Bulgaria, Croatia, Cyprus, Macedonia, Moldova, Montenegro, Romania, Serbia, Slovenia and Ukraine)



FEICA - Association of the European Adhesive and Sealant Industry
www.feica.eu