

Europe Adhesives and Sealants Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 110 pages | Mordor Intelligence

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Report description:

The Europe Adhesives Market valued at USD 19,700 million by the end of this year, and the market is projected to register a CAGR of 6% during the forecast period. The COVID pandemic has disrupted the supply chain network of raw materials, negatively affecting the adhesives and sealants market. Post-pandemic, the rising demand for construction, healthcare, and packaging industries is expected to revive the market for adhesives and sealants.

Key Highlights

The demand for adhesives and sealants is extensively driven by the growing demand from the construction industry and increasing healthcare infrastructure.

However, the market growth is likely to be hindered by the rising environmental concerns regarding the usage of chemicals.

In the studied market, the packaging end-user segment is expected to dominate the market. However, the aerospace end-user segment is expected to be the fastest-growing segment in the region during the forecast period.

The innovation and development of bio-based adhesives and shifting focus toward adhesive bonding for composite materials are likely to offer opportunities for the adhesives and sealants market in the region.

Germany stands to be the largest market for adhesives and sealants in the region, where the consumption is driven by the end-user industries, such as automotive, construction, electronics, and packaging.

Europe Adhesives & Sealants Market Trends

Packaging Segment Dominates the Market Demand

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In Europe, the packaging segment is the largest consumer of adhesives and sealants. The packaging sector has been witnessing strong demand from end-user applications, such as food and beverages, cosmetics, consumer goods, stationery, and other end-user industries.

Moreover, the demand for cosmetics and food and beverage products is expected to grow due to the growing population and demand for quality products, urbanization, and consumers inclining toward technology, hence, fueling the demand for the packaging industry.

In Germany, the recycling technology sector grew as recycling capacities expanded dramatically, partly due to China's ban on importing waste plastic packaging. Therefore, increasing the use of recycled plastic packaging products increases the use of adhesives. In addition, the German government set a goal of having 90% of home plastic packaging recyclable or reusable by 2025, which will increase the plastic packaging in the country. Packaging production in Germany increased, reaching 203.01 million tons in 2021 compared to 195.2 million tons of production in 2020, thereby increasing the adhesives consumption volume by around 8% in 2021 compared to 2020.

In France, post-COVID-19 pandemic, the demand for retail e-commerce sales increased. The retail eCommerce revenue increased in 2021, reaching USD 92.71 billion compared to USD 80.31 billion in 2020, and is likely to reach USD 143.2 billion by 2025. This increases the demand for packaging products in the country and is expected to increase the demand for packaging adhesives over the forecast period.

Similarly, the United Kingdom produced around 1.9 million tons of packaging paper and paperboard and 5.3 million tons of corrugated board in 2021, thereby increasing the demand for packaging adhesives in the country.

Hence, such trends driving the growth of the packaging industry is likely to further fuel the consumption of adhesives and sealants in the region.

Germany to Dominate the Market

Germany dominates the region in the consumption of adhesives and sealants, owing to the presence of prominent automotive production, rising construction activities, and growth in the packaging, aerospace, and healthcare end-user industries in the country.

Germany has the largest construction industry in Europe. In 2021, the German government initiated the construction of the Digital Park Fechenheim on a 10.7ha area, with a gross floor area of 100,000 m², in Frankfurt-Fechenheim, Hesse, Germany, with an investment of USD 1,179 million. The construction project is expected to be completed by Q4 2028.

Germany is one of the biggest e-commerce markets in Europe and has the second largest population in Europe, which will drive the packaging production market. Compared to Europe's average, Germany has a high number of online shoppers, the percentage of people using the internet, and the average annual spending. Total sales of goods sold online reached around EUR 99.1 billion in 2021, an increase compared to EUR 83.3 billion in 2020.

Packaging production is majorly driven by plastics in the country, which nearly accounts for around 79% of the packaging produced in 2021. In addition, with the advancement of plastic recyclability, the plastic production segment is likely to register the fastest growth rate of around 3.32% CAGR during the projected period.

Germany is one of the largest markets for medical devices in Europe. In 2021, the German medical devices market accounted for about USD 39.2 billion and is expected to reach about USD 41.9 billion in 2022. Thus, it will likely to drive the market for adhesives in the country.

Hence, such trends in end-user industries are expected to drive the consumption of adhesives and sealants in the country over the forecast period.

Europe Adhesives & Sealants Market Competitor Analysis

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Europe Adhesives and Sealants Market is consolidated in nature, with much healthy competition in the market. The major companies are Arkema Group, Sika AG, H.B. Fuller Company, Henkel AG & Co. KGaA, and Huntsman International LLC.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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