

## **Europe Automotive Adhesives & Sealants Market - Size, Share, Covid-19 Impact & Forecasts Up To 2028**

Market Report | 2023-01-23 | 205 pages | Mordor Intelligence

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### **Report description:**

The Europe Automotive Adhesives & Sealants Market is projected to register a CAGR of 4.95%

#### Key Highlights

**Largest Segment by Technology - Reactive :** In Europe, reactive technology accounts for the highest market share due to its wide-ranging applications in the automotive industry for assembling, repairing, and thread-locking, among others.

**Largest Segment by Resin - Polyurethane :** Polyurethane resins hold the largest market share owing to their wide-ranging applications in the automotive industry, specifically for exterior applications.

**Largest Segment by Country - Germany :** With the presence of a huge number of automotive manufacturers and their manufacturing operations, Germany holds the largest market share in Europe.

**Fastest-growing Segment by Country - France :** Due to the rising concern toward carbon emission norms and rapidly growing demand for electric vehicles, France is projected to be the fastest-growing country over the forecast period.

#### Europe Automotive Adhesives & Sealants Market Trends

Polyurethane is the largest segment by Resin.

Polyurethane, epoxy, and acrylic resins account for a large share of the European automotive adhesives and sealants market. The share of polyurethane resins is higher as they are most commonly used in the automotive industry to manufacture high-resilience foam seating, rigid foam insulation panels, B-pillars, headliners, suspension insulators, bumpers and other interior parts of light

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commercial vehicles, cars, and electric vehicles.

In Europe, the usage of epoxy resins is increasing in countries like Germany, Russia, Poland, France, the United Kingdom, Belgium, and Italy. The use of lightweight resins in automotive vehicle parts increased along with automotive vehicle production capacities in these countries. In 2021, the production of light commercial vehicles increased to 2.1 million units, an increase of 1% over 2020. Thus, the usage of acrylic, silicone, and other resin-based adhesives and sealants increased in the region.

The stringent emission norms implemented by governments in the region and the shift toward vehicle electrification by players are expected to boost the growth of the European automotive adhesives market over the forecast period. The market is expected to witness significant growth owing to the benefits offered by automotive adhesives over traditional metal welding. Automotive adhesives also reduce the noise, harshness, and vibration of the vehicle and provide comfortable driving. Hence, owing to such factors, the market is estimated to register a CAGR of 4.57% during the forecast period (2022-2028).

Germany is the largest segment by Country.

Europe's automotive adhesives and sealants demand declined slightly in 2018 and 2019 due to changes in global vehicle standards and demand falls in western Europe and international trade conflicts. In 2020, Europe's automotive adhesives and sealants demand decreased by 20% as vehicle production fell from 21.56 million units in 2019 to 16.9 million units in 2020 due to operational and supply chain restrictions caused by the COVID-19 pandemic.

Germany has the largest share of the demand for automotive adhesives and sealants among European countries due to its large manufacturing capacity, which is supported by the integrated value chain and R&D infrastructure of the country. In 2021, Germany manufactured 3.3 million units which constitute up to 20% of the total vehicles manufactured in Europe.

Polyurethane and epoxy-based adhesives and sealants are most commonly used in the region because they can be used as structural adhesives to enhance the load-bearing capacity of the vehicle. They also offer heat and chemical resistance along with electric insulation, which makes them ideal for PCB (Printed Circuit Board) applications. In 2021, 85 million kilograms of polyurethane-based products were consumed, and by 2028 this is expected to reach 105.6 million kilograms with a CAGR of 3.16%.

As part of the European commission's climate goals to reduce greenhouse house emissions by at least 55% by 2030. The legislation 'Fit for 55' sets targets to reduce CO2 emissions from cars by 55% and vans by 50% by 2030. This regulation has boosted the demand for electric vehicles, which in turn is expected to boost the demand for PU, acrylic, and silicone-based products in the forecast period, as they can also be used in automotive electronics.

#### Europe Automotive Adhesives & Sealants Market Competitor Analysis

The Europe Automotive Adhesives & Sealants Market is fairly consolidated, with the top five companies occupying 74.87%. The major players in this market are 3M, H.B. Fuller Company, Henkel AG & Co. KGaA, Huntsman International LLC and Sika AG (sorted alphabetically).

Additional Benefits:

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

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