

Europe Polyurethane Adhesives Market - Size, Share, Covid-19 Impact & Forecasts Up To 2028

Market Report | 2023-01-23 | 210 pages | Mordor Intelligence

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Report description:

The Europe Polyurethane Adhesives Market is projected to register a CAGR of 6.53%

Key Highlights

Largest Segment by End User Industry - Packaging : Packaging is the dominant end-user industry in the market owing to the adhesives' widespread usage in laminating applications for flexible food packaging.

Largest Segment by Technology - Water-borne : Water-borne is the largest technology type in the market owing to its wide range of applications across major end-user industries, including building and construction and packaging.

Largest Segment by Country - Germany : In Europe, Germany holds the highest market share owing to the strong presence of manufacturers in the country's automotive, packaging, and building and construction industries.

Fastest-growing Segment by Country - Russia : Due to the rapid urbanization and increasing demand for sustainable packaging solutions, Russia is likely to be the fastest-growing country in the European polyurethane adhesives market.

Europe Polyurethane Adhesives Market Trends

Packaging is the largest segment by End User Industry.

Polyurethane adhesives are widely used in the packaging industry for food and beverage packaging, container packaging, end-of-line packaging for functional barrier applications, and metal packaging. The United Kingdom is one of the largest packaging markets in the country. The country's designed improvements and innovation, combined with a shifting focus toward the usage of

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recyclable materials for packaging, are expected to offer numerous opportunities for market growth, thus, creating opportunities for the launch of new products into the market. The UK packaging manufacturing industry records annual sales of GBP 11 billion, which is likely to drive the market for packaging adhesives in the region.

The demand for polyurethane adhesives in the construction industry grew tremendously in 2021 because of the European Union's Commission's recovery plan post an economic slowdown due to the COVID-19 pandemic in 2020, such as Next Generation EU in which a fund has been allocated for the construction sector to make European buildings environmentally benign and reduce the wastage of resources. The overall growth in demand for polyurethane construction adhesives was the highest in 2021 for the Rest of Europe regional segment because of the Nordic countries, such as Denmark, which witnessed a 17.8% growth in their construction output.

In Europe, Germany accounts for the largest healthcare industry. The annual expenditure on health in the country is estimated to be more than EUR 375 billion, excluding fitness and wellness. Owing to its demographic changes and digitalization trends, healthcare expenditure is expected to continue rising and drive the polyurethane adhesives market in the region over the forecast period.

Germany is the largest segment by Country.

In the period 2017 to 2021, the demand generated from the Europe region ranked 2nd among all regions. The share of adhesive demand from this region has consistently occupied 24-25% of the global demand because of the high manufacturing capacity of end-user industries, like automotive, aerospace, building and construction, and other industries in the region. Polyurethane adhesives with hot melt and water-borne technologies generate most of the demand in the region.

From 2017 to 2019, the demand for adhesives from this region increased with a CAGR of 1.85%. The slow growth in the demand for polyurethane adhesives has resulted because of slow growth in construction activities and a decrease in Automotive production in the region. The demand from these end-user industries declined with a CAGR of 0.44% and -0.50%, respectively, during this period.

In 2020, due to constraints in operations, labor, raw material, supply chain, and other areas, the demand from all end users across the region declined. Among all Industries from all countries in the region, the footwear industry in Germany and the automotive industry in France took the worst hit, declining by 37.89% and 35.94%, respectively, in Y-o-Y volume terms.

In 2021, the demand for polyurethane adhesives started to recover from all countries in the region and is expected to outgrow pre-pandemic demand volume by 2022. The demand from Italy has witnessed the highest Y-o-Y growth of 8.38% in volume terms. This growth trend is expected to continue during the forecast period. The overall demand from the Asia-Pacific region is expected to increase with a CAGR of 3.55% during the forecast period.

Europe Polyurethane Adhesives Market Competitor Analysis

The Europe Polyurethane Adhesives Market is fragmented, with the top five companies occupying 30.18%. The major players in this market are Arkema Group, 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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