

France Adhesives - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2028

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Report description:

The France Adhesives Market size is estimated at USD 1.79 billion in 2024, and is expected to reach USD 2.25 billion by 2028, growing at a CAGR of 5.88% during the forecast period (2024-2028).

Increase in healthcare expenditure to drive the demand for adhesive

- In France, end-user industries, like packaging, healthcare, construction, share the highest market share in the adhesives market. Flexible packaging experienced substantial growth in France. As cheap and lightweight packaging gains popularity in France, it encourages manufacturers to use flexible packaging for different products.

- Adhesives are majorly consumed in the packaging industry in the country owing to their importance in bonding plastics, metals, and paper & cardboard packaging applications. Waterborne adhesives are highly consumed in the industry because of their cheaper cost and high bonding strength which is required in these applications. It is seen that nearly 87 thousand tons of water-borne adhesives are consumed in the packaging industry of the country during 2021.

- In France, construction adhesives are also widely used. The European Commission launched the 'Next Generation EU Recovery Plan', in which a major chunk of funds is allocated for the construction of buildings that are energy efficient and have a lesser carbon footprint. This is expected to lead to the construction of newer buildings and the renovation of older buildings. The construction sector in France is expected to register a CAGR of 6.65%, which is expected to lead to an increase in the demand for adhesives in the forecast period.

- Healthcare expenditure in France is much higher compared to its neighboring countries. The average health expenditure in Europe is USD 3,858 per capita, whereas, in France, it is USD 4,491 per capita, as per the data provided by the World Bank in 2019. However, the medical device market reached USD 43 billion by 2021 due to a rapid increase in demand with the adoption of

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new technologies. This is likely to drive the market for adhesives in the country.

France Adhesives Market Trends

Rising trend of cheap and lightweight packaging in France drives the demand for flexible and rigid plastic packaging

- France had a GDP of USD 44,750 per capita, with a growth rate of 2.9% Y-o-Y in 2022. The packaging industry sector contributed around 0.68% of the country's GDP. France has the third-largest packaging industry in Europe. The factors affecting the French packaging industry are trade exchanges, employment, wine production, government policy support, etc.
- The country's economy observed a slowdown in 2020 because of the impact of the COVID-19 pandemic. The production volume was reduced by 4.77% in the same year compared to 2019. This happened due to supply chain disruptions, labor shortages, and a lockdown in the country for nearly three months. The economic recovery in the country started as international borders opened in 2021, resulting in a regular supply of raw materials for production, which increased by 4,100 tons in 2021.
- In Europe, packaging production reached USD 400 billion annually, of which 13% is produced in France. The packaging industry in the country is dominated by plastic packaging (38%) and paper & paperboard (29%) packaging, which is majorly used in food packaging, beverages, healthcare, and beauty products. France is a leading producer of wooden packaging, accounting for 20% of the total European wooden packaging.
- Germany is the largest customer of the French packaging industry, with a trade deficit of EUR 920 million in 2019. The rising trend of cheap and lightweight packaging in France is expected to drive the demand for flexible and rigid plastic packaging in the coming years. Hence, it may lead to the growth of the packaging industry in the country. However, declining wine production in the country may hinder packaging products in the future.

In addition to net-zero vehicle emissions by 2035, electric vehicle registrations growth is likely to propel the automotive production

- The automotive industry in France has fared much better compared to other major European economies. Automotive vehicle production experienced continuous growth till 2018 and further exhibited a decline of 8.3% in 2019, as the automotive market was negatively affected by the COVID-19 pandemic.
- In 2020, the country produced 1,316,371 cars and light commercial vehicles compared to 2,175,350 vehicles produced during 2019, recording a decline of 39.5%, as production came to a halt in 2020 due to the COVID-19 pandemic. The pandemic forced the temporary shutdown of manufacturing units across different parts of the country. Limited raw material supply added to the challenges faced by the automobile sector.
- The automotive market remained flat in 2021 as the shortage of semiconductors impacted automotive production in the country. The French automotive vehicle production volume is expected to reach pre-pandemic levels over the coming years as the automotive industry gets massive government support (fiscal spending and tax breaks).
- In 2021, the country's new plug-ins electric vehicle registration stood at over 315,000, registering a growth rate of 62% compared to 2020, enhancing the demand of the electric vehicle segment in France. Along with it, electric vehicles registered a 21.4% market share in March 2022, up from 16.1% Y-o-Y.

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- The French car industry has unanimously condemned the European Parliament's vote to ban the production of combustion engine cars from 2035. The country plans to achieve net-zero vehicle emissions by 2035, which is likely to drive the automotive vehicle market in the country over the forecast period.

France Adhesives Industry Overview

The France Adhesives Market is moderately consolidated, with the top five companies occupying 49.16%. The major players in this market are 3M, Arkema Group, H.B. Fuller Company, Henkel AG & Co. KGaA and Sika AG (sorted alphabetically).

Additional Benefits:

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

Table of Contents:

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 REPORT OFFERS

3 INTRODUCTION

3.1 Study Assumptions & Market Definition

3.2 Scope of the Study?

3.3 Research Methodology

4 KEY INDUSTRY TRENDS

4.1 End User Trends

4.1.1 Aerospace

4.1.2 Automotive

4.1.3 Building and Construction

4.1.4 Footwear and Leather

4.1.5 Packaging

4.1.6 Woodworking and Joinery

4.2 Regulatory Framework

4.2.1 France

4.3 Value Chain & Distribution Channel Analysis

5 MARKET SEGMENTATION (includes market size in Value in USD and Volume, Forecasts up to 2028 and analysis of growth prospects)

5.1 End User Industry

5.1.1 Aerospace

5.1.2 Automotive

5.1.3 Building and Construction

5.1.4 Footwear and Leather

5.1.5 Healthcare

5.1.6 Packaging

5.1.7 Woodworking and Joinery

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5.1.8 Other End-user Industries

5.2 Technology

5.2.1 Hot Melt

5.2.2 Reactive

5.2.3 Solvent-borne

5.2.4 UV Cured Adhesives

5.2.5 Water-borne

5.3 Resin

5.3.1 Acrylic

5.3.2 Cyanoacrylate

5.3.3 Epoxy

5.3.4 Polyurethane

5.3.5 Silicone

5.3.6 VAE/EVA

5.3.7 Other Resins

6 COMPETITIVE LANDSCAPE

6.1 Key Strategic Moves

6.2 Market Share Analysis

6.3 Company Landscape

6.4 Company Profiles (includes Global Level Overview, Market Level Overview, Core Business Segments, Financials, Headcount, Key Information, Market Rank, Market Share, Products and Services, and Analysis of Recent Developments).

6.4.1 3M

6.4.2 Arkema Group

6.4.3 AVERY DENNISON CORPORATION

6.4.4 Bolton Adhesives

6.4.5 Dow

6.4.6 H.B. Fuller Company

6.4.7 Henkel AG & Co. KGaA

6.4.8 Huntsman International LLC

6.4.9 MAPEI S.p.A.

6.4.10 Sika AG

7 KEY STRATEGIC QUESTIONS FOR ADHESIVES AND SEALANTS CEOS

8 APPENDIX

8.1 Global Adhesives and Sealants Industry Overview

8.1.1 Overview

8.1.2 Porter's Five Forces Framework (Industry Attractiveness Analysis)

8.1.3 Global Value Chain Analysis

8.1.4 Drivers, Restraints, and Opportunities

8.2 Sources & References

8.3 List of Tables & Figures

8.4 Primary Insights

8.5 Data Pack

8.6 Glossary of Terms

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