

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

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Report description:

The South Africa Adhesives Market size is estimated at USD 442.17 million in 2024, and is expected to reach USD 552.91 million by 2028, growing at a CAGR of 5.75% during the forecast period (2024-2028).

Increasing investments in South Africa from foreign companies to boost the demand for adhesives

- South Africa is one of the top individual demand generators in Africa. From 2017 to 2021, South Africa maintained a 14 to 16% share. Acrylic, epoxy, and EVA are the most often used resins in South Africa. The building and construction, packaging, and healthcare industries account for the majority of the country's adhesive demand.
- The demand for adhesives increased dramatically between 2017 and 2019. The automotive and construction end-user sectors are driving the increase in the demand for adhesives, mostly as a result of policy assistance from the government. For example, the introduction of the Automotive Manufacturing Development Program (APDP) in 2013 enhanced long-term automotive investments in the nation, which expanded local production capacity during this forecasting time.
- Adhesives are majorly consumed in the packaging industry in the country owing to their importance in bonding plastics, metals, and paper and 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 30 thousand tons of water-borne adhesives were consumed in the packaging industry of the country in 2021.
- Furthermore, African nations are making significant attempts to improve domestic production with the support of increased investment from Asian and European countries. As a result, established overseas firms, such as Lupin and Dr. Reddy's, are anticipated to increase their manufacturing capacity in the country. This factor is predicted to increase demand for healthcare packaging materials, such as blister packs, caps and closures, pouches, and IV bags.

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South Africa Adhesives Market Trends

Plastic packaging with nearly 79% of the overall production will dominate the packaging industry

- The demand for quick and on-the-go packaged items is increasing due to consumers' busier lifestyles, greater spending power, and related factors. In today's competitive FMCG market, it has become inevitable for companies to use attractive packaging and offer innovation in their packaging to stand out from their competitors and maintain their brand in the market. Consumers and manufacturers prefer paper and paperboard packaging instead of plastic packaging. This factor is likely to result in increased use of paper-based packaging and its adhesive usage. In 2021, paper and paperboard packaging accounted for 21% of total packaging, amounting to 9.7 million tonnes of packaging, and it is expected to register a growth of 3.83% during the forecast period.
- Due to the COVID-19 pandemic, the country-wide lockdowns and temporary shutdown of manufacturing facilities caused several issues, including disruptions in supply chains and import and export trade. As a result, the country's packaging production registered a stagnant growth of 0.91% in 2020 compared to the previous year, significantly affecting the market. Packaging production is majorly driven by plastic in the country, which accounted for 36.2 million ton or around 79% of the packaging produced in 2021. With the advancement of plastic recyclability, the plastic segment is likely to maintain its growth and register a 3.17% CAGR during the forecast period.
- The growing interest in public health issues during the post-pandemic period, along with the emerging e-commerce activities across the nation, is likely to boost the growth of the food processing industry, which will further drive packaging demand over the coming years.

Growing popularity of electric vehicles will proliferate automotive production

- The South African automotive sector comprises 22 businesses that manufacture cars and commercial vehicles. Among these are seven major vehicle manufacturers/assemblers [car and LCV] and several medium and heavy commercial vehicle assemblers [MCV, HCV, and buses]. In addition, 21 enterprises are involved in importing and distributing new automobiles in the country. There are over 500 automotive component suppliers, with 180 being first-tier suppliers. BMW, Ford, Isuzu, Mercedes-Benz, Nissan, Toyota, and Volkswagen are the primary drivers of the value chain. These firms significantly impact the economy of Gauteng, the Eastern Cape, and KwaZulu-Natal. These OEMs, together with their suppliers, are at the heart of the three regional clusters, and their socioeconomic contribution is critical to the social upliftment of these areas.
- In 2019, the country recorded about 6,31,921 units of vehicles produced, which drastically reduced to 4,47,213 units in 2020, accounting for a decline of about 29% owing to the COVID-19 pandemic. Due to this, the variation in automotive production between 2019 and 2021 was about -21%, whereas the variation between 2020 and 2021 was recorded at about 12%.
- Over the years, the use of internal combustion engine (ICE) vehicles has contributed significantly to problems such as climate change, environmental pollution, and increased cost of gas. The automotive industry in South Africa is among the highest CO2 emitters, responsible for approximately 20% of total emissions and the third highest contributor to air pollution. Owing to this, the industry has adopted alternatives such as EVs due to their simplicity and technological advancements, which ensure low

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South Africa Adhesives Industry Overview

The South Africa Adhesives Market is fragmented, with the top five companies occupying 27.81%. The major players in this market are Arkema Group, AVERY DENNISON CORPORATION, H.B. Fuller Company, Henkel AG & Co. KGaA and Permosel (Pty) Ltd (sorted alphabetically).

Additional Benefits:

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

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