

Sustainable Adhesives Market by Type (Recyclable, Renewable, Biodegradable, Green), Raw Material (Water-Based, Plant-Based, EVA Based, Acrylic Based), End-Use Industry (Packaging, Woodworking, Construction, Medical), Region - Global Forecast to 2029

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Report description:

The sustainable adhesives market is projected to reach USD 3.7 billion by 2029, at a CAGR of 5.2% from USD 2.9 billion in 2024.

"Increasing industrialization & urbanization globally coupled with rising demand for sustainability is driving the demand for sustainable adhesives."

Industrialization, urbanization, and growing demands for sustainability serve as major drivers behind the sustainable adhesives market. These two factors impact production methods and environmental policies. With the rise in industrialization and the development of urban centers, demand for adhesives increases in the case of construction, packaging, and the automotive sector, amongst many others. This increased demand in adhesive applications places additional importance on the adoption of sustainable measures to help reduce the environmental impact of the industrial process. The process of urbanization is very complex and fast, generating huge volumes of wastes, hence the need for delivering eco-friendly solutions that support recycling and waste reduction. Sustainable adhesives include biodegradable, recyclable, and low-VOC options to meet these challenges by improving the environmental footprint of the bonded material and making the recycle process easier. At the same time, industrialization is very often accompanied by more rigorous environmental regulations, which encourages manufacturers to look for greener alternatives in order to remain compliant with new standards. Increased awareness among consumers, coupled with their penchant for green products, further forces businesses to seek adhesives that will offer the best possible means of meeting their corporate social responsibility goals. Hence, the implementation of sustainable adhesives within industrial and urban projects is of prime necessity in order to come up to regulatory expectations and consumer demand, thus acting as a boost for the market

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growth. This synergy of industrialization, urbanization, and sustainability underlines the need for adopting eco-friendly adhesive solutions in the dynamically changing global scenario.

"Renewable adhesives, by type, accounts for the second-largest market share in 2023."

After recyclable adhesives, renewable adhesives are the second-biggest type in the sustainable adhesives market since they have a huge potential for deriving environmental benefits and are in growing demand due to increased awareness of the need for eco-friendly solutions. The renewable adhesives are produced from bio-based materials, like plant-based resins and polymers, which reduce dependence on fossil fuels and bring down the carbon footprint of adhesive products. Inherent in their very nature is compatibility with the goals of sustainability and circular economy principles which are very alluring to industries that seek greener alternatives. Also, new technologies for renewable adhesives have improved their performance and fitted them for a wide variety of uses, from packaging and construction to even the automotive industry. Its ability to provide effective bonding, all while being derived from renewable resources, supports both regulatory compliance and company sustainability initiatives. Rising consumer pressure, coupled with pressure from regulators, pushes companies toward more sustainable practices, and as such, renewable adhesives remain on a growth path, further entrenching their position as one of the key segments in the sustainable adhesives market.

"Construction is expected to be the second largest end-use industry for sustainable adhesives market during the forecast period, in terms of value."

The factors categorizing the construction industry, after packaging, as the second-largest end-use industry for sustainable adhesives includes several reasons. The construction sector grows considerably. The growth is driven by increasing urbanization, infrastructure development, and renovation projects throughout the world. This growth increases the demand for such adhesives, which promote eco-friendly building techniques and meet strict environmental regulations. Sustainably made and low in volatile organic compounds (VOCs), adhesives derived from renewable resources help minimize the environmental impact associated with these materials and construction processes. So the move toward green building certifications and standards-such as LEED, or Leadership in Energy and Environmental Design-begins to focus on the use of sustainable materials within adhesives with regard to healthy indoor air quality and overall environmental performance. Adhesives that are long-lasting, high performance in nature, and environmentally sustainable contribute to these green building goals by simultaneously providing better energy efficiency, less waste, and lower carbon footprints in construction projects. Furthermore, the construction industry is moving toward sustainable adhesives without compromising the need for long-lasting, high performance requirements of adhesive bonding solutions in which the structural integrity is not affected by best practices. Hence, the construction industry is looking forward to sustainability and regulatory compliance and is one of the leading segments for sustainable adhesives, after packaging.

"Plant-based is expected to be the second largest raw material segment for sustainable adhesives market during the forecast period, in terms of value."

Although the second-largest share of sustainable adhesives is derived from plant-based materials after water-based materials, due to their environmental advantages and rising popularity, they form the second-largest raw material type in the sustainable adhesives market. Plant-based adhesives are manufactured from renewable sources like starch, cellulose, and natural resins, which have a significant reduction in reliance upon fossil fuels to meet global sustainability objectives. They are renewable resource-based and thus offer an eco-friendly option against the petroleum-based ones by reducing carbon footprint and supporting the circular economy. Growing pressure from consumers and regulators for greener products is driving companies toward plant-based adhesives, especially in packaging, construction, and automobile industries. Moreover, their biodegradable and non-toxic nature further enhances the potential. With better performance coming out of plant-based adhesives through technological advancement, adoption increases, thereby further strengthening their position as the second major segment after water-based adhesives in the sustainable adhesives market.

"Based on region, North America was the second largest market for sustainable adhesives in 2023."

North America is the second largest contributor for the market, and several factors contribute to it. This region emphasizes a great deal of attention toward environmental regulations and sustainability initiatives. As such, these efforts are motivating the demand for green products across industries like packaging, construction, and automotive. North American companies are becoming more responsible toward CSR or corporate social responsibility and sustainability objectives, which call for ever increased use of more sustainable adhesives, reducing their impact on the environment and meeting the regulatory standards. Besides, there exists a

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wide industrial base in North America, largely driven by heavy investments in research and development for innovations and improvements in adhesive technologies. The strong focus on innovation has led to the introduction of high-performance sustainable adhesives, which have met the demanding requirements of today's applications. Consumer awareness and preference for green products are also high in North America, which fuels the market. Most of the key adhesive manufacturers are located in this region, along with well-established supply chain infrastructure, thereby ensuring that the products have wide availability and substantial adoption rates. All these factors make North America an influential market for sustainable adhesives, driving growth in the segment to become the second-largest globally.

In the process of determining and verifying the market size for several segments and subsegments identified through secondary research, extensive primary interviews were conducted. A breakdown of the profiles of the primary interviewees is as follows:

□ By Company Type: Tier 1 - 50%, Tier 2 - 25%, and Tier 3 - 25%

□ By Designation: C-Level - 10%, Director Level - 15%, and Others - 75%

□ By Region: North America - 30%, Europe -30%, Asia Pacific - 20%, Middle East & Africa - 10%, and South America-10%

The key players in this market are BASF SE (Germany), DuPont (US), Henkel AG & Co. KGaA (Germany), H.B. Fuller Company (US), Jowat SE (Germany), Dow (US), Arkema (France), Avery Dennison Corporation (US), Synthos (Poland), Paramelt B.V. (Netherlands), Artience Co., Ltd. (Japan) etc.

Research Coverage

This report segments the market for the sustainable adhesives market on the basis of raw material, type, end-use industry and region. It provides estimations for the overall value of the market across various regions. A detailed analysis of key industry players has been conducted to provide insights into their business overviews, products & services, key strategies, new product launches, expansions, and mergers & acquisitions associated with the market for the sustainable adhesives market.

Key benefits of buying this report

This research report is focused on various levels of analysis - industry analysis (industry trends), market ranking analysis of top players, and company profiles, which together provide an overall view of the competitive landscape, emerging and high-growth segments of the sustainable adhesives market; high-growth regions; and market drivers, restraints, opportunities, and challenges. The report provides insights on the following pointers:

□ Analysis of key drivers: Urbanization & infrastructure development coupled with green building initiatives, Rising demand for recyclable packaging and circular economy principles and advancement in sustainable adhesive technologies.

□ Market Penetration: Comprehensive information on the sustainable adhesives market offered by top players in the global sustainable adhesives market.

□ Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the sustainable adhesives market.

□ Market Development: Comprehensive information about lucrative emerging markets - the report analyzes the markets for the sustainable adhesives across regions.

□ Market Diversification: Exhaustive information about new products, untapped regions, and recent developments in the global sustainable adhesives market.

□ Competitive Assessment: In-depth assessment of market shares, strategies, products, and manufacturing capabilities of leading players in the sustainable adhesives market.

Table of Contents:

1	INTRODUCTION	26
1.1	STUDY OBJECTIVES	26
1.2	MARKET DEFINITION	26
1.3	STUDY SCOPE	27
1.3.1	INCLUSIONS AND EXCLUSIONS	27
1.3.2	YEARS CONSIDERED	29
1.4	CURRENCY CONSIDERED	29

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1.5	UNITS CONSIDERED	29
1.6	LIMITATIONS	29
1.7	STAKEHOLDERS	30
2	RESEARCH METHODOLOGY	31
2.1	RESEARCH DATA	31
2.1.1	SECONDARY DATA	32
2.1.1.1	Key data from secondary sources	32
2.1.2	PRIMARY DATA	32
2.1.2.1	Key data from primary sources	33
2.1.2.2	Key participants in primary interviews	33
2.1.2.3	Breakdown of interviews with experts	34
2.1.2.4	Key industry insights	34
2.2	BASE NUMBER CALCULATION	35
2.2.1	SUPPLY-SIDE APPROACH	35
2.2.2	DEMAND-SIDE APPROACH	35
2.3	FORECAST NUMBER CALCULATION	35
2.3.1	SUPPLY SIDE	35
2.3.2	DEMAND SIDE	36
2.4	MARKET SIZE ESTIMATION	36
2.4.1	BOTTOM-UP APPROACH	37
2.4.2	TOP-DOWN APPROACH	37
2.5	DATA TRIANGULATION	38
2.6	RESEARCH ASSUMPTIONS	39
2.7	GROWTH FORECAST	39
2.8	RISK ASSESSMENT	40
2.9	FACTOR ANALYSIS	40
3	EXECUTIVE SUMMARY	41
?		
4	PREMIUM INSIGHTS	46
4.1	ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN SUSTAINABLE ADHESIVES MARKET	46
4.2	SUSTAINABLE ADHESIVES MARKET, BY TYPE	47
4.3	SUSTAINABLE ADHESIVES MARKET, BY RAW MATERIAL	47
4.4	SUSTAINABLE ADHESIVES MARKET, BY END-USE INDUSTRY	48
4.5	SUSTAINABLE ADHESIVES MARKET, BY COUNTRY	48
5	MARKET OVERVIEW	49
5.1	INTRODUCTION	49
5.2	MARKET DYNAMICS	50
5.2.1	DRIVERS	50
5.2.1.1	Increasing green building initiatives in urban areas	50
5.2.1.2	Rising demand for recyclable packaging and adoption of circular economy principles	51
5.2.1.3	Advancements in sustainable adhesive technologies	51
5.2.2	RESTRAINTS	52
5.2.2.1	Complex regulatory compliance and end-of-life considerations	52
5.2.3	OPPORTUNITIES	52
5.2.3.1	Growing demand in emerging end-use industries	52
5.2.4	CHALLENGES	53
5.2.4.1	Performance limitations and erratic availability of raw materials	53

5.3	IMPACT OF GENERATIVE AI ON SUSTAINABLE ADHESIVES MARKET	53
5.3.1	INTRODUCTION	53
5.3.2	CHEMICAL COMPANIES EMBRACING AI ACROSS VARIOUS BUSINESS AREAS	54
5.3.3	USE OF GENERATIVE AI IN SUSTAINABLE ADHESIVES MARKET	55
5.3.4	IMPACT OF GENERATIVE AI ON SUSTAINABLE ADHESIVES MARKET	56
6	INDUSTRY TRENDS	57
6.1	INTRODUCTION	57
6.2	TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS	57
6.3	SUPPLY CHAIN ANALYSIS	59
6.4	INVESTMENT AND FUNDING SCENARIO	61
6.5	PRICING ANALYSIS	61
6.5.1	AVERAGE SELLING PRICE TREND, BY REGION	61
6.5.2	AVERAGE SELLING PRICE TREND, BY RAW MATERIAL	62
6.5.3	AVERAGE SELLING PRICE TREND, BY END-USE INDUSTRY	62
6.5.4	AVERAGE SELLING PRICE TREND OF KEY PLAYERS, BY RAW MATERIAL	63
6.6	ECOSYSTEM ANALYSIS	63
6.7	TECHNOLOGY ANALYSIS	65
6.7.1	KEY TECHNOLOGIES	65
6.7.2	COMPLEMENTARY TECHNOLOGIES	66
6.7.3	ADJACENT TECHNOLOGIES	67
6.8	PATENT ANALYSIS	68
6.8.1	METHODOLOGY	68
6.8.2	GRANTED PATENTS, 2014-2023	69
6.8.2.1	Publication trends for last ten years	69
6.8.3	INSIGHTS	69
6.8.4	LEGAL STATUS	70
6.8.5	JURISDICTION ANALYSIS	70
6.8.6	TOP APPLICANTS	71
6.8.7	KEY PATENTS FOR SUSTAINABLE ADHESIVES	72
6.9	TRADE ANALYSIS	73
6.9.1	IMPORT SCENARIO	73
6.9.2	EXPORT SCENARIO	74
6.10	KEY CONFERENCES AND EVENTS, 2024-2025	74
6.11	TARIFF AND REGULATORY LANDSCAPE	75
6.11.1	TARIFFS RELATED TO SUSTAINABLE ADHESIVES	75
6.11.2	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	76
6.11.3	REGULATIONS RELATED TO SUSTAINABLE ADHESIVES	81
6.12	PORTER'S FIVE FORCES ANALYSIS	82
6.12.1	THREAT OF NEW ENTRANTS	83
6.12.2	THREAT OF SUBSTITUTES	83
6.12.3	BARGAINING POWER OF SUPPLIERS	84
6.12.4	BARGAINING POWER OF BUYERS	84
6.12.5	INTENSITY OF COMPETITIVE RIVALRY	84
6.13	KEY STAKEHOLDERS AND BUYING CRITERIA	85
6.13.1	KEY STAKEHOLDERS IN BUYING PROCESS	85
6.13.2	BUYING CRITERIA	86
6.14	MACROECONOMIC INDICATORS	87

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6.14.1	GDP TRENDS AND FORECAST OF MAJOR ECONOMIES	87
6.15	CASE STUDY ANALYSIS	87
6.15.1	BOSTIK DEVELOPS HIGH-PERFORMANCE SUSTAINABLE ADHESIVE SOLUTIONS	87
6.15.2	APPLIED ADHESIVES HELPS BABY FOOD MANUFACTURER TO EFFICIENTLY UPDATE LABELS	88
6.15.3	HENKEL, KRATON, AND DOW COLLABORATE TO REDUCE CARBON FOOTPRINT OF ADHESIVES	89
7	SUSTAINABLE ADHESIVES MARKET, BY TYPE	91
7.1	INTRODUCTION	92
7.2	RECYCLABLE ADHESIVES	93
7.2.1	INCREASING ADOPTION OF CIRCULAR ECONOMY PRINCIPLES TO DRIVE MARKET	93
7.3	RENEWABLE ADHESIVES	93
7.3.1	GROWING NEED TO REDUCE DEPENDENCE ON FOSSIL FUELS TO BOOST DEMAND	93
7.4	REPULPABLE ADHESIVES	94
7.4.1	HIGH DEMAND IN PAPER AND PACKAGING INDUSTRIES TO DRIVE MARKET	94
7.5	BIODEGRADABLE ADHESIVES	94
7.5.1	INCREASING NEED FOR BIODEGRADABLE PACKAGING SOLUTIONS TO BOLSTER MARKET	94
7.6	GREEN ADHESIVES	95
7.6.1	NEED TO ENHANCE INDOOR AIR QUALITY AND WORKER SAFETY TO DRIVE DEMAND	95
7.7	OTHERS	95
7.7.1	HOT-MELT ADHESIVES	95
7.7.2	UV-CURABLE ADHESIVES	95
8	SUSTAINABLE ADHESIVES MARKET, BY RAW MATERIAL	96
8.1	INTRODUCTION	97
8.2	WATER-BASED	99
8.2.1	GROWING DEMAND FOR ENVIRONMENTALLY FRIENDLY ADHESIVES TO DRIVE MARKET	99
8.3	PLANT-BASED	99
8.3.1	NEED TO REDUCE ENVIRONMENTAL IMPACT OF ADHESIVES TO FUEL DEMAND	99
8.4	EVA-BASED	100
8.4.1	ABILITY TO BOND DIVERSE MATERIALS TO BOOST ADOPTION	100
8.5	ACRYLIC-BASED	100
8.5.1	VERSATILITY TO DRIVE DEMAND ACROSS INDUSTRIES	100
8.6	OTHER RAW MATERIALS	101
8.6.1	ANIMAL-BASED	101
8.6.2	CELLULOSE DERIVATIVES	101
8.6.3	BIO-BASED POLYURETHANES	101
9	SUSTAINABLE ADHESIVES MARKET, BY END-USE INDUSTRY	102
9.1	INTRODUCTION	103
9.2	PACKAGING	105
9.2.1	INCREASING DEMAND FOR NON-TOXIC AND FOOD-SAFE ADHESIVES TO DRIVE MARKET	105
9.3	WOODWORKING	106
9.3.1	RIISING NEED FOR ECO-FRIENDLY FURNITURE MANUFACTURING TO BOOST MARKET	106
9.4	MEDICAL	106
9.4.1	RIISING DEMAND FOR BIOCOMPATIBLE AND HYPOALLERGENIC ADHESIVES TO DRIVE MARKET	106
9.5	CONSUMER GOODS	107
9.5.1	NEED FOR SUSTAINABLE BONDING SOLUTIONS TO PROPEL MARKET	107
9.6	CONSTRUCTION	107

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9.6.1	REQUIREMENT FOR WEATHER-RESISTANT ADHESIVES TO BOOST DEMAND	107
9.7	AUTOMOTIVE	108
9.7.1	ABILITY TO REDUCE VEHICLE WEIGHT TO FUEL DEMAND	108
9.8	OTHER END-USE INDUSTRIES	108
9.8.1	ELECTRONICS	108
9.8.2	TEXTILE	108
9.8.3	RENEWABLE ENERGY	109
10	SUSTAINABLE ADHESIVES MARKET, BY REGION	110
10.1	INTRODUCTION	111
10.2	NORTH AMERICA	113
10.2.1	US	118
10.2.1.1	Rising demand in packaging and construction industries to drive market	118
10.2.2	CANADA	120
10.2.2.1	Focus on sustainable development to boost market	120
10.2.3	MEXICO	122
10.2.3.1	Government's sustainability goals to drive demand	122
10.3	EUROPE	124
10.3.1	GERMANY	130
10.3.1.1	High demand in automotive and packaging industries to drive market	130
10.3.2	ITALY	132
10.3.2.1	Expanding end-use industries to boost demand	132
10.3.3	FRANCE	134
10.3.3.1	Government emphasis on sustainability to bolster market	134
10.3.4	UK	136
10.3.4.1	Rising demand in construction and automotive industries to propel market	136
10.3.5	SPAIN	138
10.3.5.1	Growing packaging industry to drive demand	138
10.3.6	RUSSIA	140
10.3.6.1	Increasing environmental awareness to boost demand	140
10.3.7	REST OF EUROPE	142
10.4	ASIA PACIFIC	144
10.4.1	CHINA	150
10.4.1.1	Growing focus on sustainability across industries to drive demand	150
10.4.2	JAPAN	152
10.4.2.1	Emphasis on innovation and technological advancements to support market	152
?		
10.4.3	INDIA	154
10.4.3.1	Strict environmental regulations to drive market	154
10.4.4	SOUTH KOREA	156
10.4.4.1	Increasing adoption in construction industry to boost market	156
10.4.5	REST OF ASIA PACIFIC	158
10.5	MIDDLE EAST & AFRICA	160
10.5.1	GCC COUNTRIES	166
10.5.1.1	UAE	166
10.5.1.1.1	Growing construction activity to fuel market	166
10.5.1.2	Saudi Arabia	168
10.5.1.2.1	Investments in infrastructure development to bolster market	168

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10.5.1.3	Rest of GCC countries	169
10.5.2	SOUTH AFRICA	171
10.5.2.1	Growing demand in various end-use industries to boost market	171
10.5.3	REST OF MIDDLE EAST & AFRICA	173
10.6	SOUTH AMERICA	175
10.6.1	ARGENTINA	180
10.6.1.1	Availability of natural resources to drive market	180
10.6.2	BRAZIL	182
10.6.2.1	Strict environmental regulations to encourage adoption	182
10.6.3	REST OF SOUTH AMERICA	184
11	COMPETITIVE LANDSCAPE	187
11.1	INTRODUCTION	187
11.2	KEY PLAYER STRATEGIES/RIGHT TO WIN, JANUARY 2021-MAY 2024	187
11.3	MARKET SHARE ANALYSIS, 2023	189
11.3.1	RANKING OF KEY MARKET PLAYERS, 2023	189
11.3.2	MARKET SHARE OF KEY PLAYERS, 2023	189
11.4	REVENUE ANALYSIS, 2020-2024	192
11.5	BRAND/PRODUCT COMPARISON	193
11.6	COMPANY EVALUATION MATRIX: KEY PLAYERS, 2023	193
11.6.1	STARS	193
11.6.2	EMERGING LEADERS	193
11.6.3	PERVASIVE PLAYERS	194
11.6.4	PARTICIPANTS	194
11.6.5	COMPANY FOOTPRINT: KEY PLAYERS, 2023	195
11.6.5.1	Company footprint	195
11.6.5.2	Type footprint	196
11.6.5.3	End-use industry footprint	197
11.6.5.4	Raw material footprint	198
11.6.5.5	Region footprint	199
11.7	COMPANY EVALUATION MATRIX: START-UPS/SMES, 2023	199
11.7.1	PROGRESSIVE COMPANIES	199
11.7.2	RESPONSIVE COMPANIES	199
11.7.3	DYNAMIC COMPANIES	199
11.7.4	STARTING BLOCKS	200
11.7.5	COMPETITIVE BENCHMARKING: START-UPS/SMES, 2023	201
11.7.5.1	Key start-ups/SMEs	201
11.7.6	COMPANY VALUATION AND FINANCIAL METRICS	204
11.8	COMPETITIVE SCENARIO AND TRENDS	205
11.8.1	PRODUCT LAUNCHES	205
11.8.2	DEALS	207
11.8.3	EXPANSIONS	211
11.8.4	OTHERS	213
12	COMPANY PROFILES	215
12.1	KEY PLAYERS	215
12.1.1	BASF SE	215
12.1.1.1	Business overview	215
12.1.1.2	Products/Solutions/Services offered	216

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12.1.1.3	Recent developments	217
12.1.1.3.1	Product launches	217
12.1.1.3.2	Expansions	218
12.1.1.4	MnM view	218
12.1.1.4.1	Key strengths/Right to win	218
12.1.1.4.2	Strategic choices	218
12.1.1.4.3	Weaknesses/Competitive threats	218
12.1.2	HENKEL AG & CO. KGAA	219
12.1.2.1	Business overview	219
12.1.2.2	Products/Solutions/Services offered	220
12.1.2.3	Recent developments	221
12.1.2.3.1	Product launches	221
12.1.2.3.2	Deals	222
12.1.2.3.3	Expansions	223
12.1.2.4	MnM view	223
12.1.2.4.1	Key strengths/Right to win	223
12.1.2.4.2	Strategic choices	224
12.1.2.4.3	Weaknesses/Competitive threats	224
12.1.3	H.B. FULLER COMPANY	225
12.1.3.1	Business overview	225
12.1.3.2	Products/Solutions/Services offered	226
12.1.3.3	Recent developments	227
12.1.3.3.1	Product launches	227
12.1.3.3.2	Deals	227
12.1.3.3.3	Expansions	229
12.1.3.4	MnM view	229
12.1.3.4.1	Key strengths/Right to win	229
12.1.3.4.2	Strategic choices	229
12.1.3.4.3	Weaknesses/Competitive threats	230
12.1.4	OWAT SE	231
12.1.4.1	Business overview	231
12.1.4.2	Products/Solutions/Services offered	231
12.1.4.3	Recent developments	232
12.1.4.3.1	Product launches	232
12.1.4.3.2	Deals	233
12.1.4.3.3	Expansions	233
12.1.4.3.4	Others	233
12.1.4.4	MnM view	234
12.1.4.4.1	Key strengths/Right to win	234
12.1.4.4.2	Strategic choices	234
12.1.4.4.3	Weaknesses/Competitive threats	234
12.1.5	DOW	235
12.1.5.1	Business overview	235
12.1.5.2	Products/Solutions/Services offered	236
12.1.5.3	Recent developments	237
12.1.5.3.1	Product launches	237
12.1.5.3.2	Deals	237

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12.1.5.3.3	Others	238
12.1.5.4	MnM view	238
12.1.5.4.1	Key strengths/Right to win	238
12.1.5.4.2	Strategic choices	238
12.1.5.4.3	Weaknesses/Competitive threats	238
12.1.6	DUPONT	239
12.1.6.1	Business overview	239
12.1.6.2	Products/Solutions/Services offered	240
12.1.6.3	Recent developments	241
12.1.6.3.1	Others	241
12.1.6.4	MnM view	241
12.1.6.4.1	Key strengths/Right to win	241
12.1.6.4.2	Strategic choices	241
12.1.6.4.3	Weaknesses/Competitive threats	242
12.1.7	ARKEMA	243
12.1.7.1	Business overview	243
12.1.7.2	Products/Services/Solutions offered	244
12.1.7.2.1	Deals	245
12.1.7.3	MnM view	246
12.1.7.3.1	Key strengths/Right to win	246
12.1.7.3.2	Strategic choices	246
12.1.7.3.3	Weaknesses/Competitive threats	246
12.1.8	AVERY DENNISON CORPORATION	247
12.1.8.1	Business overview	247
12.1.8.2	Products/Solutions/Services offered	248
12.1.8.3	Recent developments	249
12.1.8.3.1	Deals	249
12.1.8.3.2	Others	250
12.1.8.4	MnM view	250
12.1.8.4.1	Key strengths/Right to win	250
12.1.8.4.2	Strategic choices	250
12.1.8.4.3	Weaknesses/Competitive threats	250
12.1.9	PARAMELT B.V.	251
12.1.9.1	Business overview	251
12.1.9.2	Products/Solutions/Services offered	251
12.1.9.3	MnM view	252
12.1.9.3.1	Key strengths/Right to win	252
12.1.9.3.2	Strategic choices	252
12.1.9.3.3	Weaknesses/Competitive threats	252
12.1.10	SYNTHOS	253
12.1.10.1	Business overview	253
12.1.10.2	Products/Solutions/Services offered	253
12.1.10.3	Recent developments	254
12.1.10.3.1	Product launches	254
12.1.10.3.2	Others	254
12.1.10.4	MnM view	254
12.1.10.4.1	Key strengths/Right to win	254

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12.1.10.4.2	Strategic choices	255
12.1.10.4.3	Weaknesses/Competitive threats	255
12.1.11	ARTIENCE CO., LTD.	256
12.1.11.1	Business overview	256
12.1.11.2	Products/Solutions/Services offered	257
12.1.11.3	Recent developments	258
12.1.11.3.1	Product launches	258
12.1.11.3.2	Expansions	259
12.1.11.3.3	Others	259
12.1.11.4	MnM view	260
12.1.11.4.1	Key strengths/Right to win	260
12.1.11.4.2	Strategic choices	260
12.1.11.4.3	Weaknesses/Competitive threats	260
12.2	OTHER PLAYERS	261
12.2.1	ARTIMELT AG	261
12.2.2	FOLLMANN GMBH & CO. KG	262
12.2.3	LD DAVIS	263
12.2.4	EMSLAND GROUP	264
12.2.5	ECOSYNTHETIX INC	265
12.2.6	WEISS CHEMIE + TECHNIK GMBH & CO. KG	266
12.2.7	SELLEYS	267
12.2.8	AVEBE	268
12.2.9	MASTER BOND	269
12.2.10	KLEIBERIT SE & CO. KG	269
12.2.11	THE COMPOUND COMPANY	270
12.2.12	U.S. ADHESIVES, INC.	271
12.2.13	FRANKLIN INTERNATIONAL	271
12.2.14	PREMIER STARCH PRODUCTS PVT. LTD	272
12.2.15	C.B. ADHESIVES LTD	272
13	APPENDIX	273
13.1	DISCUSSION GUIDE	273
13.2	KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL	276
13.3	CUSTOMIZATION OPTIONS	278
13.4	RELATED REPORTS	278
13.5	AUTHOR DETAILS	279

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