

Hot-Melt Adhesives Market Assessment, By Resin Type [Ethylene Vinyl Acetate, Styrene Block Copolymers, Polyurethane, Polyamide, Polyolefins, and Others], By Application [Packaging, Electronics, Automotive, Building and Construction, Footwear, Furniture and Mattress, and Others], By Region, Opportunities and Forecast, 2018-2032F

Market Report | 2025-04-22 | 225 pages | Market Xcel - Markets and Data

AVAILABLE LICENSES:

- Single User License \$4500.00
- Multi-User/Corporate Licence \$5700.00
- Custom Research License \$8200.00

Report description:

Global hot-melt adhesives market is projected to witness a CAGR of 4.37% during the forecast period 2025-2032, growing from USD 9.20 billion in 2024 to USD 12.95 billion in 2032F, driven by increasing demand across key end-user sectors such as packaging, automotive, building and construction, electronics, and footwear. The rapid growth of e-commerce significantly boosted the need for fast-setting, durable adhesives in packaging applications. Additionally, the shift toward lightweight vehicles and advanced bonding solutions in the automotive sector enhanced the adoption of hot melt adhesives. Furthermore, rising infrastructure development and woodworking activities in the construction industry also contribute to market growth. According to Oxford Economic, the global construction industry anticipated to witness growth of USD 4.2 trillion. The construction market is expected to reach USD 13.9 trillion by 2037 from USD 9.7 trillion in 2022. The hot melt adhesives offer rapid curing, strong bonds, and versatile applications across flooring, insulation, roofing, and ceramic tiles. Their cost-effectiveness and eco-friendly properties align with sustainable construction trends, making them indispensable in modern infrastructure development.

Increasing Demand in Packaging Drives Market Growth

The packaging industry is a significant driver of the global hot-melt adhesives market. The rise in e-commerce and the need for efficient packaging solutions have boosted demand for these adhesives. Hot melts are preferred over other materials due to their fast-setting properties, strong bonding strength, and eco-friendliness, making them ideal for application in case and carton sealing, tray making, labeling, and lamination. Food and beverage packaging's growing demand also propels the demand, and hot

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

melts provide durable bonds necessary to ensure products are kept secure during transport. Additionally, their ability to adhere to a broad spectrum of materials like paperboard, corrugated cardboard, and plastic films makes them more flexible in the packaging industry. This makes hot-melt adhesives a valuable component in the packaging industry's ongoing quest for efficiency and preservation of the environment.

In April 2023, Dow Inc. and Avery Dennison Corporation developed a new hotmelt label adhesive solution that allows the mechanical recycling of polyolefin filmic labels and polypropylene (PP) or polyethylene (PE) packaging in one stream. This innovative solution is the first of its kind in the label market and has been approved by Recyclclass for recycling in the HDPE colored stream- Class B. The new olefinic hotmelt, based on the same chemistry as PP/PE packaging, allows the label and packaging to be treated as a mono-material and recycled together, offering better recyclability without compromising performance.

Technological Advancements and Sustainability Propel Market Growth

Technological advancements and sustainability concerns are key drivers for the hot-melt adhesives market. Innovations in bio-based formulations and high-performance adhesives are expanding their application scope across industries. These advances enhance the strength and durability of bonding and, as a result, enhance the appeal of hot melts to markets such as automotive and construction. Furthermore, the transition to environmentally friendly solutions with lower VOC emissions than solvent-based adhesives comply with worldwide sustainability programs and stimulates further market growth. As companies more and more focus on efficiency and environmental stewardship, the market for premium hot melt adhesives is progressively on the rise. In addition, studies on recyclable and biodegradable adhesives should remain focused on making the market more appealing to environmentally conscious consumers and businesses.

In June 2023, Henkel AG & Co. KGaA started production of a new manufacturing facility for the Adhesive Technologies business unit within the Yantai Chemical Industry Park in Shandong Province, China, with an investment of around USD 130 million.

Adhesive Technologies emphasized the plant's significance in China's economic resilience and growth, highlighting its commitment to the future of its business in the Asia-Pacific region.

Emerging Markets and Industrialization Contribute to the Growth of the Market

Emerging markets, particularly in the Asia-Pacific region, are driving growth in the hot-melt adhesives market. Rapid industrialization and urbanization have increased consumer purchasing power, boosting demand across sectors like construction and automotive. The expansion of manufacturing capabilities and investments in infrastructure also contribute to this growth. Additionally, the adoption of automated production systems that rely on hot melt adhesives enhances operational efficiency and reduces costs, further supporting market expansion. Therefore, the development in these economies will drive the market growth for hot-melt adhesives immensely. Additionally, government initiatives to spur industrial development and foreign investment will drive this growth, and thus, emerging markets will drive future growth in the international hot melt adhesives market.

In March 2025, the Government of India took many initiatives to encourage investment and bring greater industrial activity to the country. The Department of Industrial Policy and Promotion (DIP) is implementing various initiatives to boost industrial growth in India, including Make in India, Start-up India, PM GatiShakti, National Industrial Corridor Programme, etc.

South America Hot Melt Adhesives Market Witnessing Significant Growth

The South America hot melt adhesives market is experiencing significant growth due to the popularity of polyurethane (PU) adhesives due to their versatility, low cost, and excellent bonding properties. These adhesives are widely used in industries such as automotive, packaging, construction, and textiles, where their high bonding strength and flexibility are essential. The construction sector's expansion in countries like Brazil and Colombia is driving demand for PU hot-melt adhesives for various applications. The automotive industry's growth in Brazil and Argentina is also driving demand for PU hot-melt adhesives in car assembly and components. The packaging industry, particularly in the food and beverage sectors, is also increasing demand for PU hot melted adhesives due to the need for durable and efficient packaging solutions. Cities like Sao Paulo and Buenos Aires are key hubs for the South America PU hot-melt adhesives market, driven by their strong industrial base and strategic location.

In June 2022, Henkel AG & Co. KGaA opened a new 30,000 square-meter plant in Mexico for hot melt adhesives. The facility is designed to manufacture pressure and non-pressure sensitive hot melts under the Technomelt brand, will produce products such as high-performance SUPRA and COOL. These adhesives are used in consumer goods and packaging industries for food, beverages, and personal care products.

Future Market Scenario (2025-2032F)

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

-□The rising e-commerce industry and the demand for effective and long-lasting packaging solutions will continue to fuel demand for hot-melt adhesives in the packaging industry.

-□The shift towards low-VOC and eco-friendly adhesives to promote global sustainability fuels the use of hot-melt adhesives as it is a cleaner option than traditional adhesives.

-□Furthermore, advancements in adhesive technology, such as improved adhesion strength and stability, are anticipated to strengthen hot melt adhesives' performance to an even broader application range across industries.

-□The increasing demand for hot-melt adhesives in automotive parts such as interior trim and the rising construction sector will propel market growth as these resins have better bonding characteristics and heat resistance.

-□The trend towards automation in manufacturing processes will increase the demand for hot-melt adhesives due to their efficiency and speed in production lines.

Key Players Landscape and Outlook

The key players in the global market for hot melt adhesives are focusing on innovation and sustainability and expanding their application scope to stay competitive. They are spending significantly on R&D to create high-performance adhesive products with higher bonding strength, longer shelf life, and environmentally friendly features. Growing demand for green adhesives with lower Volatile Organic Compounds (VOCs) is compelling the companies to emphasize green products. Moreover, consumers are taking advantage of technological advancements to serve high-growth applications like packaging, automotive, construction, and nonwoven hygiene products. Strategic actions like capacity expansion, mergers and acquisitions, and joint ventures are being undertaken to expand their market share and cater to burgeoning global demand. The emerging markets in Asia-Pacific nations are of particular interest with the increasing industrialization and urbanization.

In March 2023, Pidilite Industries Limited, India's leading manufacturer of adhesives, sealants, and construction chemicals, further strengthened its collaboration with Jowat SE, a German family-owned enterprise and one of the leading suppliers of industrial adhesives worldwide. Strengthening the partnership further, Pidilite will exclusively offer Indian customers locally manufactured Jowat hot melts.

Table of Contents:

- 1.□Project Scope and Definitions
- 2.□Research Methodology
- 3.□Executive Summary
- 4.□Voice of Customers
 - 4.1.□Respondent Demographics
 - 4.2.□Factors Consider in Purchase Decision
 - 4.3.□Brand Awareness
 - 4.4.□Unmet Needs
- 5.□Global Hot-Melt Adhesives Market Outlook, 2018-2032F
 - 5.1.□Market Size Analysis & Forecast
 - 5.1.1.□By Value
 - 5.1.2.□By Volume
 - 5.2.□Market Share Analysis & Forecast
 - 5.2.1.□By Resin Type
 - 5.2.1.1.□Ethylene Vinyl Acetate
 - 5.2.1.2.□Styrene Block Copolymers
 - 5.2.1.3.□Polyurethane
 - 5.2.1.4.□Polyamide
 - 5.2.1.5.□Polyolefins
 - 5.2.1.6.□Others
 - 5.2.2.□By Application
 - 5.2.2.1.□Packaging

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.2.2.2.□Electronics
- 5.2.2.3.□Automotive
- 5.2.2.4.□Building and Construction
- 5.2.2.5.□Footwear
- 5.2.2.6.□Furniture and Mattress
- 5.2.2.7.□Others
- 5.2.3.□By Region
- 5.2.3.1.□North America
- 5.2.3.2.□Europe
- 5.2.3.3.□Asia-Pacific
- 5.2.3.4.□South America
- 5.2.3.5.□Middle East and Africa
- 5.2.4.□By Company Market Share Analysis (Top 5 Companies and Others - By Value, 2024)
- 5.3.□Market Map Analysis, 2024
- 5.3.1.□By Resin Type
- 5.3.2.□By Application
- 5.3.3.□By Region
- 6.□North America Hot-Melt Adhesives Market Outlook, 2018-2032F
- 6.1.□Market Size Analysis & Forecast
- 6.1.1.□By Value
- 6.1.2.□By Volume
- 6.2.□Market Share Analysis & Forecast
- 6.2.1.□By Resin Type
- 6.2.1.1.□Ethylene Vinyl Acetate
- 6.2.1.2.□Styrene Block Copolymers
- 6.2.1.3.□Polyurethane
- 6.2.1.4.□Polyamide
- 6.2.1.5.□Polyolefins
- 6.2.1.6.□Others
- 6.2.2.□By Application
- 6.2.2.1.□Packaging
- 6.2.2.2.□Electronics
- 6.2.2.3.□Automotive
- 6.2.2.4.□Building & Construction
- 6.2.2.5.□Footwear
- 6.2.2.6.□Furniture & Mattress
- 6.2.2.7.□Others
- 6.2.3.□By Country Share
- 6.2.3.1.□United States
- 6.2.3.2.□Canada
- 6.2.3.3.□Mexico
- 6.3.□Country Market Assessment
- 6.3.1.□United States Hot-Melt Adhesives Market Outlook, 2018-2032F*
- 6.3.1.1.□Market Size Analysis & Forecast
- 6.3.1.1.1.□By Value
- 6.3.1.1.2.□By Volume
- 6.3.1.2.□Market Share Analysis & Forecast

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.3.1.2.1. By Resin Type
 - 6.3.1.2.1.1. Ethylene Vinyl Acetate
 - 6.3.1.2.1.2. Styrene Block Copolymers
 - 6.3.1.2.1.3. Polyurethane
 - 6.3.1.2.1.4. Polyamide
 - 6.3.1.2.1.5. Polyolefins
 - 6.3.1.2.1.6. Others
- 6.3.1.2.2. By Application
 - 6.3.1.2.2.1. Packaging
 - 6.3.1.2.2.2. Electronics
 - 6.3.1.2.2.3. Automotive
 - 6.3.1.2.2.4. Building & Construction
 - 6.3.1.2.2.5. Footwear
 - 6.3.1.2.2.6. Furniture & Mattress
 - 6.3.1.2.2.7. Others

6.3.2. Canada

6.3.3. Mexico

*All segments will be provided for all regions and countries covered

7. Europe Hot-Melt Adhesives Market Outlook, 2018-2032F

7.1. Germany

7.2. France

7.3. Italy

7.4. United Kingdom

7.5. Russia

7.6. Netherlands

7.7. Spain

7.8. Turkey

7.9. Poland

8. Asia-Pacific Hot-Melt Adhesives Market Outlook, 2018-2032F

8.1. India

8.2. China

8.3. Japan

8.4. Australia

8.5. Vietnam

8.6. South Korea

8.7. Indonesia

8.8. Philippines

9. South America Hot-Melt Adhesives Market Outlook, 2018-2032F

9.1. Brazil

9.2. Argentina

10. Middle East and Africa Hot-Melt Adhesives Market Outlook, 2018-2032F

10.1. Saudi Arabia

10.2. UAE

10.3. South Africa

11. Porter's Five Forces Analysis

12. PESTLE Analysis

13. Market Dynamics

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 13.1.□Market Drivers
 - 13.2.□Market Challenges
 - 14.□Market Trends and Developments
 - 15.□Competitive Landscape
 - 15.1.□Competition Matrix of Top 5 Market Leaders
 - 15.2.□SWOT Analysis for Top 5 Players
 - 15.3.□Key Players Landscape for Top 10 Market Players
 - 15.3.1.□3M Company
 - 15.3.1.1.□Company Details
 - 15.3.1.2.□Key Management Personnel
 - 15.3.1.3.□Products and Services
 - 15.3.1.4.□Financials (As Reported)
 - 15.3.1.5.□Key Market Focus and Geographical Presence
 - 15.3.1.6.□Recent Developments/Collaborations/Partnerships/Mergers and Acquisition
 - 15.3.2.□Henkel AG & Co. KGaA
 - 15.3.3.□Arkema S.A.
 - 15.3.4.□Huntsman International LLC.
 - 15.3.5.□Pidilite Industries Limited
 - 15.3.6.□Sika AG
 - 15.3.7.□H.B. Fuller Company
 - 15.3.8.□Jowat SE
 - 15.3.9.□ Follmann GmbH & Co. KG
 - 15.3.10.□The Dow Chemical Company
- *Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.
- 16.□Strategic Recommendations
 - 17.□About Us and Disclaimer

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Hot-Melt Adhesives Market Assessment, By Resin Type [Ethylene Vinyl Acetate, Styrene Block Copolymers, Polyurethane, Polyamide, Polyolefins, and Others], By Application [Packaging, Electronics, Automotive, Building and Construction, Footwear, Furniture and Mattress, and Others], By Region, Opportunities and Forecast, 2018-2032F

Market Report | 2025-04-22 | 225 pages | Market Xcel - Markets and Data

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4500.00
	Muti-User/Corporate Licence	\$5700.00
	Custom Research License	\$8200.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Address*

City*

Zip Code*

Country*

Date

2026-03-04

Signature

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com