

**India 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], Region, Opportunities and Forecast, FY2019-FY2033F**

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**Report description:**

India hot-melt adhesives market is projected to witness a CAGR of 5.80% during the forecast period FY2026-FY2033, growing from USD 381.12 billion in FY2025 to USD 598.34 billion in FY2033F driven by the expanding packaging industry, particularly for food and consumer goods, as these are significantly popular for efficient sealing solutions. Additionally, the rapid development in the construction sector, including infrastructure projects and residential buildings, is further boosting the use of hot melt adhesives in various applications. Furthermore, the growing automotive and electronics manufacturing industries are contributing to market expansion.

India hot-melt adhesives market is driven by the rising automotive industry, as it offers different benefits, including weight reduction, enhanced durability, and improved efficiency in manufacturing. According to the Ministry of External Affairs, Government of India, the automotive industry is on track to hit a significant milestone, with projections estimating it will reach USD 300 billion by 2026. This growth is attributed to various factors, including a shift toward autonomous and connected cars, urbanization, and an expanding middle class with greater purchasing power.

**Rising Demand for Efficient Bonding Material in Footwear Sector**

The footwear sector in India is a significant contributor to the hot melt adhesives market, driven by increasing demand for durable, lightweight, and aesthetically appealing footwear. Hot melt adhesives are widely used in shoe manufacturing due to their ability to bond diverse materials such as leather, rubber, textiles, and synthetic polymers. The rapid growth of web-based retailing sites has considerably increased the demand for footwear, and thus manufacturers have begun to utilize effective adhesive

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solutions to offer strong bonding and quicker production cycles. In addition, the growing middle class in India and rising disposable incomes have led to increased demand for high-end and customized footwear, thus driving the use of hot melt adhesives. Furthermore, the industrial and safety footwear sector benefits from such adhesives since these can create strong bonds under extreme conditions. Moreover, the shift towards green and sustainable adhesives reflects worldwide environmental trends and thus makes the market more appealing to the footwear sector.

According to the World Footwear Yearbook 2024, Indian footwear consumption reached 2563 million pairs in 2023, which was around 2526 million pairs in 2022. The country reclaimed the second position as the footwear consumer in the world, overtaking the United States.

#### Expansion of Building and Construction Industry Boosting Adhesive Usage

India's booming construction sector is a key driver for the hot melt adhesives market. The infrastructure development projects, including residential, commercial, and industrial buildings, require versatile bonding solutions that offer durability and resistance to environmental factors. Hot melt adhesives are widely applied in laminating insulation products, joining structural parts, and connecting precast concrete parts. Therefore, due to their fast setting and good tack, these are best suited for employed in the construction industry. As India is still heavily investing in infrastructure developments to fill urban development deficits, demand for hot melt adhesives in the infrastructure segment is likely to surge strongly. Additionally, efforts by the government to develop infrastructure and encourage affordable housing are likely to further propel demand. The hot melt adhesives aid in shortening construction time as well as improving overall building efficiency.

In Interim Budget 2024-25, capital investment outlay for infrastructure has been increased by 11.1% to USD 133.86 billion, which would be 3.4% of GDP. The Infrastructure Finance Secretariat is established to enhance opportunities for private investment in infrastructure that will assist all stakeholders in more private investment in infrastructure, which will directly create a substantial surge in the construction sector and demand for hot melt adhesives in the country.

#### Growth in Electronics Manufacturing Driving India Market Growth

The electronics industry in India is witnessing substantial growth, driving the demand for hot melt adhesives. The electronics sector is supported by hot melt adhesives for fixing components, enclosure assembly, and protection from moisture. Moreover, the government supports domestic electronics production and electric vehicles further propel the market opportunities for the market players. The ability of hot melt adhesives to meet the demanding requirements of these sectors, like durability, flexibility, and thermal stability, makes them inescapable in fueling India's industrial growth curve. In addition, increasing focus on electric vehicles and premium electronics necessitates adhesives that are superior in quality and can withstand very high temperatures and vibrations, contributing further to the reliance on hot melt adhesives in these sectors.

In March 2023, the Indian government approved the setting up of the Electronics Manufacturing Cluster (EMC) at Hubli-Dharwad in Karnataka, worth USD 22 million and is expected to create about 18,000 jobs and driving the demand for hot melt adhesives in India.

#### Packaging Segment Dominates the India Hot-Melt Adhesives Market

The packaging industry in India is a significant driver for the hot melt adhesives market, fueled by the rapid expansion of e-commerce and increasing consumption of packaged goods. Hot melt adhesives are commonly employed in cartons, boxes, and trays for sealing, labeling, and lamination. Their ability to various materials such as paperboard, corrugated cardboard, and plastic films makes them a packaging solution requirement. In addition, the food and drinks industry requires strong and effective packaging, which supports these adhesives even more, driving the India hot melt adhesives market demand. The environmental friendliness and versatility of hot-melt adhesives conform to the industry trend of being sustainable. In addition, the growth in online shopping platforms has led to a rise in demand for safe and tamper-evident packaging, which hot melt adhesives effectively guarantee. Therefore, their applications are becoming highly sought after in various packaging types.

For instance, in November 2024, Packsize International, LLC. decided to enter a partnership with Henkel AG & Co. KGaA to launch a biobased adhesive for sustainable packaging named Eco-Pax. This development helps the company in reducing the carbon footprint of the packaging industry and increasing revenue in the coming years.

According to the Packaging Industry Association of India, the Indian packaging market is anticipated to reach USD 204.81 billion by 2025, registering a CAGR of 26.7% during the period of 2020-2025. Packaging is one of the fastest industries in India, growing at a pace of 22-25 percent each year and becoming a favored center for the packaging industry.

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## Future Market Scenario (FY2026-FY20233F)

-□The packaging expansion, driven by the expansion of e-commerce, and the initiative of the construction sector to create infrastructure will continue to drive demand for hot melt adhesives. These sectors require strong and durable bonding, hence hot melt adhesives become a popular choice.

-□Technical advancements in hot melt glue technology, for example, green and bio-based adhesive development, will propel their use across industries. This aligns with global trends for sustainability and pressures from environmental regulations to reduce VOC emissions.

-□Increasing disposable incomes and urbanization in India are stimulating demand for consumer goods, furniture, and electronics, all of which are reliant on hot melt adhesives for assembly and production. The trend is set to persist, propelling market growth.

-□Chemical companies are looking to invest in hot-melt adhesives manufacturing facilities in the coming years which will help to boost the hot-melt adhesives market size.

## Key Players Landscape and Outlook

The India hot melt adhesives market features a competitive landscape with numerous domestic and global players actively contributing to its growth. These companies are leveraging innovation and strategic initiatives to address the evolving needs of industries such as packaging, automotive, construction, footwear, and electronics. The market participants are cautiously focusing on the creation of green and sustainable adhesive products to satisfy stringent environmental policies and consumer demand for more green products. The efforts are geared towards the production of bio-based adhesives with low VOC emissions, hence broadening market appeal across industries. In addition, joint ventures among manufacturers and industry players are driving product formulation innovation and expanding market coverage. The joint ventures enable companies to attain custom industry requirements, such as enhanced bonding strength, reduction in curing time, and enhanced durability.

In April 2023, Pidilite Industries Limited introduced a made-in-India PU hot melt adhesive in partnership with Jowat SE, targeting the furniture, packaging, automotive, door, and window industries. The product will be manufactured in Vapi, Gujarat, and sold under the brand name "Fevicol Jowat." This will enable Pidilite to serve clients in high-growth segments like furniture, packaging, automotive, and textiles, where specialized adhesives are used.

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\*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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