

## **Indonesia Adhesives And Sealants - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-04-28 | 80 pages | Mordor Intelligence

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### **Report description:**

The Indonesia Adhesives And Sealants Market size is estimated at USD 0.96 billion in 2025, and is expected to reach USD 1.33 billion by 2030, at a CAGR of 6.66% during the forecast period (2025-2030).

The COVID-19 pandemic had a negative impact on the market for Indonesia adhesives and sealants. Nationwide lockdowns and strict social distancing measures led to the closure of aerospace, automotive, construction, healthcare, packaging, and footwear industries consequently affecting the Indonesia adhesives and sealants market. However, after the COVID-19 pandemic, the market recovered well following the lifting of restrictions. It rebounded significantly due to the increased consumption of adhesives and sealants in various applications such as aerospace, automotive, construction, healthcare, packaging, footwear, and others.

### **Key Highlights**

- Growing demand from the construction industry and increasing demand from the packaging industry in the country are expected to drive the market for Indonesia's adhesives and sealants market during the forecast period.
- On the flip side, the over-reliance on the import of raw materials is likely to hinder the market's growth.
- The innovation and development of bio-based adhesives and shifting focus toward adhesive bonding for composite materials are likely to act as opportunities for the market studied over the forecast period.

### **Indonesia Adhesives and Sealants Market Trends**

Water-borne Adhesives Technology to Dominate the Market

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- Water-borne adhesives use water as a carrier or diluting medium to disperse a resin. They are set by allowing the water to evaporate or be absorbed by the substrate. These adhesives are compounded with water as a diluent rather than a volatile organic solvent, and they can be considered low-VOC adhesives.
- Water-borne adhesives are produced from either soluble synthetic polymers (from polymers such as cellulose ethers, polyvinyl alcohol, methylcellulose, carboxymethylcellulose, and polyvinylpyrrolidone) or natural polymers (from vegetable sources such as starches and dextrans, protein sources such as blood, fish, milk albumen, and soybean, and animal sources such as bones and hides).
- In Indonesia, the major reason for their preference for waterborne adhesive technology over solvent-borne is due to their eco-friendly nature, as it is generally lower in volatile organic compounds (VOCs), which degrade the environment.
- In Indonesia, the market for water born adhesive technology is growing at a rate of 6.50% for the period of 2024 to 2029 as per the Mordor Intelligence analysis. The waterborne adhesives, and acrylic water-borne adhesives are majorly employed for different applications in the building and construction industry. Acrylic water-borne adhesives are majorly used as pressure-sensitive adhesives in the construction sector in the form of labels and tapes for tile bonding and laminating purposes.
- In May 2024, Henkel AG & Co. KGaA presented adhesive and coating innovations enable circularity and reduce carbon footprint. One of the product highlights is Aquence PS 3017 RE, a water-based acrylic adhesive that was developed for olefin-based film labels on washable PET bottles. It makes the process of removing the labels from the bottles easier and more energy efficient, while the purity and value of the recycled PET bottle are also increased.
- All the aforementioned benefits offered by water borne adhesives, the water borne adhesive technology is expected to dominate the market for adhesives and sealants in the country.

#### Packaging Industry to Dominate the Market

- The packaging industry is the largest consumer of the Indonesia adhesives and sealants market. Adhesives and sealants play a crucial role in the paper and packaging industries. Adhesives are used for example in laminating paper and cardboard, gluing labels, and lining food packages such as beverage cans.
- Packaging adhesives and sealants provide excellent adhesion and bonding to a wide variety of surfaces and are used in applications ranging from folding cartons to food and beverage packaging.
- Adhesives and sealants for packaging simplify manufacturing processes by enabling faster bonding and secure seals. Additionally, fast-curing packaging sealants provide flexible and reliable solutions for a wide range of packaging materials.
- According to the Mordor Intelligence estimates, the packaging volume of Indonesia has grown from 168.34 tons in 2023 to 160.55 tons in 2022. It is expected that the packaging industry will keep growing as there has been a rise in the e-commerce sector which has given a significant boost to the packaging industry in the past few years as special packaging is required for shipping goods.
- There are various investments done in the packaging sector by various companies. For instance, in 2022, China-based packaging company Lamipak kicked off the construction of its second factory in Indonesia. It plans to expand its capacity to up to 18 billion packs per year in two phases with an investment of USD 200 million by 2024.
- More recently, PT Sariguna Primatirta Tbk., also known as Tanobel, the Indonesian company behind the Cleo-branded bottled water, has set IDR 300 billion (USD 19.88 million) in capital expenditure in 2023 to build factories and expand its distribution network.
- Hence, such trends driving the growth of packaging industry is likely to further fuel the consumption of adhesives and sealants in the country.

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Indonesia adhesives and sealants market is highly fragmented. Some of the major players (not in any particular order) in the market include 3M, H.B. Fuller Company, Henkel AG & Co. KGaA, Sika AG, and DEXTONE INDONESIA.

Additional Benefits:

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

**Table of Contents:**

1 INTRODUCTION

- 1.1 Study Assumptions
- 1.2 Scope of the Report

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

- 4.1 Drivers
  - 4.1.1 Increasing Demand from the Packaging Industry
  - 4.1.2 Growing Demand from the Construction Industry
- 4.2 Restraints
  - 4.2.1 Over-reliance on Import of Raw Materials
  - 4.2.2 Other Restraints
- 4.3 Industry Value-chain Analysis
- 4.4 Porter's Five Forces Analysis
  - 4.4.1 Bargaining Power of Suppliers
  - 4.4.2 Bargaining Power of Consumers
  - 4.4.3 Threat of New Entrants
  - 4.4.4 Threat of Substitute Products and Services
  - 4.4.5 Degree of Competition

5 MARKET SEGMENTATION (Market Size in Value)

- 5.1 Adhesives by Resin
  - 5.1.1 Acrylic
  - 5.1.2 Cyanoacrylate
  - 5.1.3 Epoxy
  - 5.1.4 Polyurethane
  - 5.1.5 Silicone
  - 5.1.6 VAE/EVA
  - 5.1.7 Other Adhesives by Resin
- 5.2 Adhesives by Technology
  - 5.2.1 Hot Melt
  - 5.2.2 Reactive
  - 5.2.3 Solvent-borne

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- 5.2.4 UV Cured
- 5.2.5 Water-borne
- 5.3 Sealants by Resin
  - 5.3.1 Polyurethane
  - 5.3.2 Epoxy
  - 5.3.3 Acrylic
  - 5.3.4 Silicone
  - 5.3.5 Other Sealants by Resin
- 5.4 End-user Industry
  - 5.4.1 Aerospace
  - 5.4.2 Automotive
  - 5.4.3 Building and Construction
  - 5.4.4 Footwear and Leather
  - 5.4.5 Healthcare
  - 5.4.6 Packaging
  - 5.4.7 Woodworking and Joinery
  - 5.4.8 Other End-user Industries

## 6 COMPETITIVE LANDSCAPE

- 6.1 Mergers and Acquisitions, Joint Ventures, Collaborations, and Agreements
- 6.2 Market Share (%)\*\*/Ranking Analysis
- 6.3 Strategies Adopted by Leading Players
- 6.4 Company Profiles
  - 6.4.1 3M
  - 6.4.2 ALTECO co., ltd.
  - 6.4.3 ARKEMA
  - 6.4.4 DEXTONE INDONESIA
  - 6.4.5 H.B. Fuller Company
  - 6.4.6 Henkel AG & Co. KGaA
  - 6.4.7 Huntsman International LLC
  - 6.4.8 Mapei Inc
  - 6.4.9 Pamolite Adhesive Industry
  - 6.4.10 Pidilite Industries Ltd.
  - 6.4.11 Sika AG

## 7 MARKET OPPORTUNITIES AND FUTURE TRENDS

- 7.1 Innovation and Development of Bio-based Adhesives
- 7.2 Shifting Focus Toward Adhesive Bonding for Composite Materials

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