

**Global Polyurethane Adhesives Market Assessment, By Type [Thermoset, Thermoplastic], By Technology [Solvent Born, Hot Melt, Water Born, Others], By End-user Industry [Automotive, Building and Construction, Packaging, Leather and Footwear, General Industrial, Wood and Furniture, Others], By Region, Opportunities and Forecast, 2018-2032F**

Market Report | 2025-06-16 | 223 pages | Market Xcel - Markets and Data

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**Report description:**

Global polyurethane adhesives market is projected to witness a CAGR of 5.78% during the forecast period 2025-2032, growing from USD 10.52 billion in 2024 to USD 16.49 billion in 2032F, primarily driven by rising demand across automotive, building and construction, packaging, leather and footwear, wood and furniture industries. Increasing the application of lightweight and composite materials in automotive and construction requires high-performance bonding solutions, driving the polyurethane adhesives significantly. Additionally, the rising need for durable, temperature-resistant adhesives and the shift toward eco-friendly, low-volatile organic compounds formulations in the packaging industry fueling the adoption of polyurethane adhesives. Technological innovation facilitating strong, flexible, and sustainable adhesives, along with expanding industrialization and infrastructure development in emerging markets further contribute to market growth.

For instance, in October 2023, Henkel AG & Co. KGaA announced an investment of around USD 23 million in the expansion and modernization of its adhesives plant in Bopfingen in 2024 and 2025. The plant, which produces five different adhesive technologies, is crucial for the company's global production network. The highest-volume products include hot-melt adhesives for packaging and polyurethane adhesives for wood and furniture. The investments aimed to improve infrastructure and expand production capacities, while also focusing on advanced product formulations for hot melts and polyurethane adhesives, based on sustainable alternative raw materials.

Rising Demand for Food Packaging Drives Market Demand

Polyurethane adhesives are preferred in food packaging due to their strong bonding capabilities, flexibility, and excellent

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resistance to moisture and temperature changes, which help maintain the integrity and safety of packaged food products. These adhesives comply with stringent food safety regulations, making them suitable for applications involving indirect food contact. Additionally, the increasing consumer preference for sustainable and flexible packaging solutions, coupled with regulatory efforts to reduce plastic waste and carbon emissions, is fueling the adoption of eco-friendly polyurethane adhesives. The rapid growth of e-commerce has also heightened the need for durable, lightweight, and resealable packaging, further boosting demand. Furthermore, the polyurethane dispersion (PUD) adhesives are crucial for mono-material packaging due to their excellent bonding strength, flexibility, and resistance to moisture and temperature fluctuations. They are water-based, emit lower volatile organic compounds, and are environmentally friendly. PUD adhesives bond various substrates, maintaining strong adhesion even under transportation and handling stress.

For instance, in August 2023, Mitsui Chemicals, Inc. announced the expansion of its polyurethane dispersions production capacity, achieving more than a twofold increase in its production by 2025 to meet the growing demand for sustainable packaging driven by the European market. With the excellent heat resistance and more environmentally friendly properties, increasingly, PUDs are employed as barrier coatings on mono-material, recyclable food packaging. The expansion represents Mitsui Chemicals, Inc.'s overall strategy to support the growth of eco-friendly materials amid demands brought about by global sustainability goals.

#### Technological Innovation in Flooring Technology Propels Market Demand

The building and construction sector is acting as the strong driving force driving the polyurethane adhesives market across the world. Specifically, the flooring industry is witnessing a compelling surge in demand due to technological advancements. As materials such as luxury vinyl tile (LVT), engineered wood, and high-performance laminates advance, there is a growing demand for adhesives that offer superior bonding strength, flexibility, and resistance to moisture and chemicals. Polyurethane adhesives are increasingly preferred due to their durability and long-lasting properties. Recent developments include moisture-cured and hybrid polyurethane adhesives, which offer improved performance across various substrates and are suitable for residential and commercial use. Smart adhesive technologies, such as self-healing and temperature-sensitive adhesives, further expand the utility of polyurethane adhesives in innovative flooring solutions. The industry's shift towards sustainable building materials and stricter environmental regulations is also driving demand for low-volatile organic compounds and solvent-free polyurethane adhesives. Manufacturers are also tailoring polyurethane adhesive formulations for specific flooring applications, ensuring polyurethane adhesives remain at the forefront of flooring innovation.

For instance, in July 2023, Dow Thailand Group introduced the DIAMONDLOCK polyurethane flooring adhesive technology to the Thailand market. The versatile product is easy to use, flexible, non-flammable, user-friendly, and has non-detectable volatile organic compounds. It is "Leadership in Energy and Environmental Design" (LEED) certified and can cover a larger surface area with less volume. DIAMONDLOCK is suitable for construction and renovation, adhering to rubber, concrete, artificial turf, luxury vinyl tile, and engineered wood. Its curing time depends on humidity and temperature, and it can be ready for light traffic within 8-10 hours.

#### Thermoplastic Type Witness Dominance in the Global Market

Thermoplastic-based polyurethane adhesives are experiencing rapid growth, propelled by increasing demand from adhesive formulators and designers across diverse industries and applications such as furniture, edge banding, electronics, hot melt film, textile lamination, seam tape, footwear, and transportation, etc. This surge is largely attributed to the unique properties of thermoplastic polyurethane adhesives, including excellent adhesion, flexibility, durability, and resistance to heat, abrasion, and chemicals, making them ideal for applications requiring long-lasting and high-performance bonds. Furthermore, industries such as furniture and edge banding benefit from the strong, flexible bonds and fast-setting capabilities of thermoplastic polyurethane adhesives, while the electronics and transportation sectors value their ability to withstand environmental stress and maintain performance over time. In textile lamination and seam tape, these adhesives provide the necessary elasticity and wash resistance, supporting the production of advanced functional textiles. The footwear industry also relies on thermoplastic polyurethane adhesives for their lightweight, durable, and eco-friendly characteristics, aligning with the growing preference for sustainable materials.

For instance, in May 2024, Lubrizol Corporation expanded its bio-based thermoplastic polyurethane portfolio for adhesives with the addition of Pearlbond ECO 590 HMS TPU for hot melt adhesives (HMAs). This renewable resin is suitable for applications in furniture, edge banding, electronics, textile lamination, seam tape, footwear, and transportation. It offers fast-setting properties,

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high temperature and hydrolysis resistance, improved processability, and wide wettability. The high thermoplasticity and extrusion processing capabilities set it apart from previous bio-based HMA polymers.

#### Asia-Pacific Dominates Global Polyurethane Adhesives Market

The demand for polyurethane adhesives in the Asia-Pacific is experiencing robust growth due to rising investment in industrial operations. The region includes several developing countries which significantly boosting the investment in construction, automotive, packaging, and electronics sectors, thereby driving the demand for high-quality polyurethane adhesives in the market. Polyurethane adhesives are increasingly preferred in different end-user industries as a material that has strong bonding and low volatile organic compound emissions, making them ideal for sensitive applications.

The packaging industry is witnessing rapid expansion powered by the e-commerce boom and changing consumer preferences in developing countries. The material is highly preferred for the packaging industry as it complies with food safety standards, making it ideal for flexible packaging products. Furthermore, the ongoing innovation, such as the development of water-based, hot-melt, and ultraviolet-cured polyurethane adhesives, caters to evolving regulatory requirements and sustainability goals in industrial sectors, and this is further boosting market growth. Moreover, with the surge in residential and commercial building projects and the push towards green and sustainable construction practices, which been to greater adoption of polyurethane adhesives. The region is highly contributing to the automotive sector, which is driving the need for lightweight, high-performance materials such as polyurethane adhesives for structural bonding, interior assembly, and battery manufacturing, thereby boosting its demand in the market. Several chemical manufacturing companies are investing in increasing the production capacity of polyurethane adhesives to fulfill the rising demand for the material in end-user industries.

For instance, in February 2023, Beijing Gaomeng New Materials Co., Ltd. decided to invest in the construction of a technical transformation project with an annual output of 250 tons of new adhesive materials and 1245 tons of by-products of diethylene glycol. The project will make use of the reserved vacant site and integrate the capacity of each workshop in the existing factory area to carry out new construction and technological transformation and realize the expansion of the production capacity of existing composite polyurethane adhesives, water-based adhesives, solvent-free adhesives, and other products. This development highlights that companies are investing in increasing their production capacity, which drives the polyurethane adhesives market size in the region.

#### Impact of U.S. Tariffs on the Global Polyurethane Adhesives Market

□□ Tariffs on imported raw materials and finished polyurethane adhesives have raised input costs for the United States-based manufacturers, resulting in higher overall production expenses.

□□ End-user companies are facing elevated production costs due to the rising cost of adhesive products. Competitive market pressures often prevent manufacturers from fully transferring tariff-induced costs to customers.

□□ The rise in tariffs results in profit margins being squeezed, especially for small and mid-sized companies, limiting their ability to invest in innovation and expansion.

□□ The economic uncertainty and increased operational costs associated with tariffs have made investors more cautious, leading to instability in the market.

#### Key Players Landscape and Outlook

The prominent players in the global polyurethane adhesives market are prioritizing innovation and sustainability to maintain a competitive advantage. They are investing heavily in research and development to formulate eco-friendly, low-volatile organic compounds and solvent-free adhesives that comply with stringent environmental regulations. Expanding presence in emerging markets, especially in Asia-Pacific, is a key growth strategy due to increasing demand from the automotive, construction, packaging, and electronics sectors. Companies are also enhancing production capacities and pursuing strategic partnerships, mergers, and acquisitions to diversify product offerings and strengthen global distribution networks. Focus areas include developing adhesives tailored for lightweight materials, fast curing, and high durability to meet the evolving needs of industries such as automotive, building and construction, packaging, leather and footwear, general industrial, wood and furniture, and others.

For instance, in October 2024, Henkel Adhesive Technologies obtained the International Sustainability Carbon Certification (ISCC) PLUS certification for its Dusseldorf polyurethane production, marking the company's third European site to achieve this certification. This certification aims to meet customer demand for bio-based raw materials and product traceability, which are

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crucial competitive advantages in the market.

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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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