

**Sustainable Adhesives Market by Type (Recyclable Adhesives, Repulpable Adhesives, Renewable Adhesives, Biodegradable Adhesives, Green Adhesives, Others), Raw Material (Water-Based, Plant-Based, EVA-Based and Acrylic-Based, Others), End-use Industry (Packaging, Automotive, Medical, Woodworking, Consumer Goods, Construction, Others), and Region - Global Forecast to 2030**

Market Report | 2025-09-11 | 303 pages | MarketsandMarkets

**AVAILABLE LICENSES:**

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

**Report description:**

The sustainable adhesives market size is projected to grow from USD 4.5 billion in 2025 to USD 6.4 billion in 2030, registering a CAGR of 7.4% during the forecast period.

<https://www.marketsandmarkets.com/Images/sustainable-adhesives-market-Overview.webp>

A key factor driving the growth of the sustainable adhesives market is the increasing awareness of the environmental and health hazards posed by VOCs in traditional adhesives. VOC emissions are a major contributor to air pollution, health issues, and environmental risks, prompting industries to seek safer, greener alternatives. This awareness is boosted by regulatory frameworks across regions, including REACH in Europe and EPA regulations in the United States, which mandate lower VOC levels and promote the use of sustainable, and if possible, eco-friendly materials. Advances in technology improve bio-based, water-based, and recyclable adhesive formulations, all while maintaining high performance, making sustainable adhesives easily applicable. Additionally, industries such as packaging, automotive, construction, and furniture are adopting sustainable adhesives to support their corporate and customer sustainability goals. A combination of regulatory pressure, technological progress, and increased environmental consciousness is significantly accelerating the shift in ink and adhesive industries toward sustainable solutions.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

without compromising performance, making sustainable adhesives a preferred choice across all sectors.

"Recyclable adhesives will account for the largest share of the sustainable adhesives market in terms of volume."

Recyclable adhesives will be the largest type segment of the recyclable adhesives market because they offer a sustainable bonding solution that enables easier separation and recovery of materials at the end of a product's life, aligning with global circular economy goals. These adhesives are designed to maintain strong performance during use while allowing debonding under specific conditions-such as heat, moisture, or chemical triggers-facilitating efficient recycling of substrates like plastics, metals, glass, and paper. The packaging industry, electronics, and automotive sectors are increasingly adopting these adhesives to meet stringent environmental regulations and corporate sustainability targets. Growing consumer demand for eco-friendly products, combined with policies banning non-recyclable materials and extended producer responsibility (EPR) programs, is accelerating their adoption. Moreover, advancements in adhesive formulations are improving their versatility, compatibility with automated manufacturing, and cost-effectiveness, further driving market dominance. This combination of regulatory push, technological innovation, and industry adoption ensures their leading position.

"The water-based segment was the largest raw material segment of the sustainable adhesives market in terms of volume."

Water-based raw materials are expected to hold the largest share in the sustainable adhesives market due to their low volatile organic compound (VOC) emissions, reduced environmental impact, and compliance with stringent global regulations on harmful chemicals. These adhesives use water as a carrier instead of solvents, making them safer for both manufacturers and end-users while minimizing fire hazards and workplace health risks. Their versatility allows application across diverse industries, including packaging, woodworking, automotive, and construction, where demand for eco-friendly bonding solutions is rapidly increasing. Technological advancements have improved their performance, enabling high bonding strength, fast curing, and durability comparable to solvent-based alternatives. Additionally, the rising consumer preference for green products and increasing adoption of sustainable manufacturing practices by companies further strengthen the demand for water-based adhesives, making them the preferred choice in the sustainable adhesives market.

"Packaging will be the fastest-growing end-use industry segment of the sustainable adhesives market in terms of value."

The packaging industry is expected to be the fastest-growing end-use segment for sustainable adhesives, driven by the surge in demand for eco-friendly and recyclable packaging solutions across food & beverage, e-commerce, and consumer goods sectors. Rising environmental regulations and brand commitments to reduce plastic waste are pushing manufacturers toward bio-based, water-based, and solvent-free adhesive formulations that are compatible with paper, cardboard, and compostable films. Additionally, the rapid growth of online retail is fueling the need for strong, lightweight, and sustainable bonding solutions for corrugated boxes and flexible packaging. This shift is further supported by consumer preference for green packaging and the adoption of circular economy principles by global brands, accelerating the use of sustainable adhesives in packaging applications.

"Asia Pacific is the largest market for sustainable adhesives."

Asia Pacific holds the largest share of the sustainable adhesives market, driven by its rapidly expanding manufacturing base, high consumption of packaged goods, and increasing focus on environmentally friendly production practices. Countries such as China, India, Japan, and South Korea are witnessing strong demand from industries such as packaging, construction, automotive, and woodworking, where adhesives play a crucial role. The region's booming e-commerce sector and fast-growing food & beverage industry are accelerating the need for eco-friendly, recyclable, and water-based adhesives for flexible packaging and corrugated boxes. Moreover, supportive government policies promoting sustainable materials, coupled with rising awareness among manufacturers about reducing volatile organic compound (VOC) emissions, are fueling market growth. Asia Pacific also benefits from lower production costs, easy availability of raw materials, and the presence of major global and regional adhesive manufacturers. Ongoing investments in R&D and advancements in bio-based adhesive technology further strengthen the region's market dominance. This combination of industrial growth, regulatory support, and sustainability-driven innovation positions Asia

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

Pacific as the leading hub for sustainable adhesive adoption and production.

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

-□By Designation: Managers-20%, Directors-15%, and Others-65%

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

The sustainable adhesives market comprises major players like BASF (Germany), Henkel AG & Co. KGaA (Germany), H.B. Fuller Company (US), Jowat SE (Germany), Dow (US), DuPont (US), Arkema (France), Avery Dennison Corporation (US), Paramelt B.V (Netherlands), Synthos (Poland), artience Co., Ltd. (Japan), Sika AG (Switzerland), and 3M (US).

The study includes an in-depth competitive analysis of these key players in the sustainable adhesives market, with their company profiles, recent developments, and key market strategies.

#### Research Coverage

This report segments the sustainable adhesives market by type, raw material, end-use industry, and region, and 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, key strategies, and expansions associated with 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 into the following pointers:

-□Analysis of drivers (Environmental and Health concerns over VOCs in traditional adhesives are boosting demand for sustainable alternatives), restraints ( Higher pricing of sustainable adhesives compared to conventional alternatives), opportunities (Increasing green building initiatives in urban areas), and challenges (Performance limitations and erratic availability of raw materials) influencing the growth of sustainable adhesives market.

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

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

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

-□Market Capacity: Production capacities of companies producing sustainable adhesives are provided wherever available with upcoming capacities for the 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□27

1.1□STUDY OBJECTIVES□27

1.2□MARKET DEFINITION□27

1.3□STUDY SCOPE□28

1.3.1□INCLUSIONS AND EXCLUSIONS□28

1.3.2□YEARS CONSIDERED□30

1.3.3□CURRENCY CONSIDERED□30

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

1.3.4	UNIT CONSIDERED	30
1.4	LIMITATIONS	30
1.5	STAKEHOLDERS	30
1.6	SUMMARY OF CHANGES	31
2	RESEARCH METHODOLOGY	32
2.1	RESEARCH DATA	32
2.1.1	SECONDARY DATA	33
2.1.1.1	Key data from secondary sources	33
2.1.2	PRIMARY DATA	33
2.1.2.1	Key data from primary sources	34
2.1.2.2	Key participants in primary interviews	34
2.1.2.3	Breakdown of interviews with experts	35
2.1.2.4	Key industry insights	35
2.2	BASE NUMBER CALCULATION	36
2.2.1	SUPPLY-SIDE APPROACH	36
2.2.2	DEMAND-SIDE APPROACH	36
2.3	FORECAST NUMBER CALCULATION	36
2.3.1	SUPPLY SIDE	36
2.3.2	DEMAND SIDE	37
2.4	MARKET SIZE ESTIMATION	37
2.4.1	BOTTOM-UP APPROACH	38
2.4.2	TOP-DOWN APPROACH	38
2.5	DATA TRIANGULATION	39
2.6	RESEARCH ASSUMPTIONS	40
2.7	GROWTH FORECAST	40
2.8	RISK ASSESSMENT	41
2.9	FACTOR ANALYSIS	41
3	EXECUTIVE SUMMARY	42
?		
4	PREMIUM INSIGHTS	46
4.1	ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN SUSTAINABLE ADHESIVES MARKET	46
4.2	SUSTAINABLE ADHESIVES MARKET, BY TYPE	46
4.3	SUSTAINABLE ADHESIVES MARKET, BY RAW MATERIAL	47
4.4	SUSTAINABLE ADHESIVES MARKET, BY END-USE INDUSTRY	47
4.5	SUSTAINABLE ADHESIVES MARKET, BY COUNTRY	48
5	MARKET OVERVIEW	49
5.1	INTRODUCTION	49
5.2	MARKET DYNAMICS	49
5.2.1	DRIVERS	50
5.2.1.1	Environmental and health concerns over VOCs in traditional adhesives	50
5.2.1.2	Advancements in sustainable adhesive technologies	51
5.2.1.3	Government push to drive adoption of sustainable adhesives	52
5.2.2	RESTRAINTS	52
5.2.2.1	Higher pricing of sustainable adhesives compared to conventional alternatives	52
5.2.3	OPPORTUNITIES	53

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

- 5.2.3.1 Increasing green building initiatives in urban areas 53
- 5.2.3.2 Rising demand for recyclable packaging and adoption of circular economy principles 53
- 5.2.4 CHALLENGES 54
  - 5.2.4.1 Performance limitations and erratic availability of raw materials 54
- 5.3 IMPACT OF GENERATIVE AI ON SUSTAINABLE ADHESIVES MARKET 54
  - 5.3.1 INTRODUCTION 54
  - 5.3.2 CHEMICAL COMPANIES EMBRACING AI ACROSS VARIOUS BUSINESS AREAS 55
  - 5.3.3 USE OF GENERATIVE AI IN SUSTAINABLE ADHESIVES MARKET 56
  - 5.3.4 IMPACT OF GENERATIVE AI ON SUSTAINABLE ADHESIVES MARKET 57
- 6 INDUSTRY TRENDS 58
  - 6.1 INTRODUCTION 58
  - 6.2 TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS 58
  - 6.3 SUPPLY CHAIN ANALYSIS 59
  - 6.4 IMPACT OF 2025 US TARIFF ON SUSTAINABLE ADHESIVES MARKET 61
    - 6.4.1 INTRODUCTION 61
    - 6.4.2 KEY TARIFF RATES 61
    - 6.4.3 PRICE IMPACT ANALYSIS 62
  - 6.5 IMPACT ON COUNTRY/REGION 62
    - 6.5.1 NORTH AMERICA 62
    - 6.5.2 EUROPE 62
    - 6.5.3 ASIA PACIFIC 63
  - 6.6 IMPACT ON END-USE INDUSTRIES 63
  - 6.7 INVESTMENT AND FUNDING SCENARIO 63
  - 6.8 PRICING ANALYSIS 64
    - 6.8.1 AVERAGE SELLING PRICE TREND, BY REGION 64
    - 6.8.2 AVERAGE SELLING PRICE TREND, BY RAW MATERIAL 64
    - 6.8.3 AVERAGE SELLING PRICE TREND OF KEY PLAYERS, BY RAW MATERIAL 65
  - 6.9 ECOSYSTEM ANALYSIS 65
  - 6.10 TECHNOLOGY ANALYSIS 67
    - 6.10.1 KEY TECHNOLOGIES 67
    - 6.10.2 COMPLEMENTARY TECHNOLOGIES 68
    - 6.10.3 ADJACENT TECHNOLOGIES 69
  - 6.11 PATENT ANALYSIS 70
    - 6.11.1 METHODOLOGY 70
    - 6.11.2 GRANTED PATENTS, 2015-2024 71
      - 6.11.2.1 Patent publication trend of last 10 years 71
    - 6.11.3 INSIGHTS 71
    - 6.11.4 LEGAL STATUS 72
    - 6.11.5 JURISDICTION ANALYSIS 72
    - 6.11.6 TOP APPLICANTS 73
    - 6.11.7 KEY PATENTS FOR SUSTAINABLE ADHESIVES 74
  - 6.12 TRADE ANALYSIS 75
    - 6.12.1 IMPORT SCENARIO 75
    - 6.12.2 EXPORT SCENARIO 76
  - 6.13 KEY CONFERENCES AND EVENTS, 2024-2025 76
  - 6.14 TARIFF AND REGULATORY LANDSCAPE 77

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

6.14.1	TARIFFS RELATED TO SUSTAINABLE ADHESIVES	77
6.14.2	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	77
6.14.3	REGULATIONS RELATED TO SUSTAINABLE ADHESIVES	82
6.15	PORTER'S FIVE FORCES ANALYSIS	83
6.15.1	THREAT OF NEW ENTRANTS	84
6.15.2	THREAT OF SUBSTITUTES	84
6.15.3	BARGAINING POWER OF SUPPLIERS	85
6.15.4	BARGAINING POWER OF BUYERS	85
6.15.5	INTENSITY OF COMPETITIVE RIVALRY	85
6.16	KEY STAKEHOLDERS AND BUYING CRITERIA	86
6.16.1	KEY STAKEHOLDERS IN BUYING PROCESS	86
6.16.2	BUYING CRITERIA	87
6.17	MACROECONOMIC INDICATORS	88
6.17.1	GDP TRENDS AND FORECAST OF MAJOR ECONOMIES	88
	?	
6.18	CASE STUDY ANALYSIS	89
6.18.1	BOSTIK DEVELOPS HIGH-PERFORMANCE SUSTAINABLE ADHESIVE SOLUTIONS	89
6.18.2	APPLIED ADHESIVES HELPS BABY FOOD MANUFACTURER EFFICIENTLY UPDATE LABELS	89
6.18.3	HENKEL, KRATON, AND DOW COLLABORATE TO REDUCE CARBON FOOTPRINT OF ADHESIVES	90
7	SUSTAINABLE ADHESIVES MARKET, BY TYPE	92
7.1	INTRODUCTION	93
7.2	RECYCLABLE ADHESIVES	95
7.2.1	PRESERVE MATERIAL QUALITY AND SUPPORT CIRCULAR ECONOMY PRACTICES	95
7.3	RENEWABLE ADHESIVES	95
7.3.1	REDUCE DEPENDENCE ON FOSSIL FUELS AND PROMOTE ENVIRONMENTAL SUSTAINABILITY	95
7.4	REPULPABLE ADHESIVES	95
7.4.1	ENSURE CLEAN SEPARATION OF FIBERS AND ENHANCE RECYCLABILITY OF PAPER PRODUCTS	95
7.5	BIODEGRADABLE ADHESIVES	96
7.5.1	REDUCE LONG-TERM ENVIRONMENTAL POLLUTION AND SUPPORT ECO-FRIENDLY PRODUCT LIFE CYCLE MANAGEMENT	96
7.6	GREEN ADHESIVES	96
7.6.1	MINIMIZE ENVIRONMENTAL IMPACT WHILE MAINTAINING STRINGENT REGULATORY STANDARDS FOR SAFETY AND SUSTAINABILITY	96
7.7	OTHER TYPES	97
7.7.1	HOT MELT ADHESIVES	97
7.7.2	UV-CURABLE ADHESIVES	97
7.7.3	SOLVENT-FREE ADHESIVES	97
8	SUSTAINABLE ADHESIVES MARKET, BY RAW MATERIAL	98
8.1	INTRODUCTION	99
8.2	WATER-BASED	101
8.2.1	FIND WIDE-SCALE USE FOR VERSATILE BONDING APPLICATIONS IN PACKAGING AND WOODWORKING	101
8.3	PLANT-BASED	101
8.3.1	USED AS SUSTAINABLE BONDING SOLUTIONS ACROSS INDUSTRIES,	

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

- FROM CONSTRUCTION TO PACKAGING 101
- 8.4 EVA-BASED 102
  - 8.4.1 COMBINE FLEXIBILITY AND DURABILITY WITH RENEWABLE COMPONENTS 102
- 8.5 ACRYLIC-BASED 102
  - 8.5.1 OFFER ENHANCED DURABILITY, UV RESISTANCE, AND STRONG BONDING CAPABILITIES 102
- 8.6 OTHER RAW MATERIALS 103
  - 8.6.1 ANIMAL-BASED 103
  - 8.6.2 BIO-BASED POLYURETHANE 103
- 9 SUSTAINABLE ADHESIVES MARKET, BY END-USE INDUSTRY 104
  - 9.1 INTRODUCTION 105
  - 9.2 PACKAGING 107
    - 9.2.1 INCREASING DEMAND FOR NON-TOXIC, FOOD-SAFE ADHESIVES TO DRIVE MARKET 107
  - 9.3 WOODWORKING 108
    - 9.3.1 LOW-VOC ADHESIVES CRUCIAL FOR ECO-FRIENDLY FURNITURE MANUFACTURING 108
  - 9.4 MEDICAL 108
    - 9.4.1 NEED FOR BIOCOMPATIBLE AND HYPOALLERGENIC ADHESIVES TO ENSURE SAFETY AND REGULATORY COMPLIANCE TO BOOST MARKET 108
  - 9.5 CONSUMER GOODS 109
    - 9.5.1 ECO-CONSCIOUS BONDING SOLUTIONS SUPPORT SUSTAINABLE PRODUCT LINES, PROMOTING BRAND SUSTAINABILITY 109
  - 9.6 CONSTRUCTION 109
    - 9.6.1 STRONG BONDING CAPABILITIES ENHANCE ENERGY EFFICIENCY THROUGH EFFECTIVE INSULATION AND WEATHER-RESISTANT PROPERTIES 109
  - 9.7 AUTOMOTIVE 110
    - 9.7.1 IMPROVED FUEL EFFICIENCY AND VEHICLE PERFORMANCE WITH REDUCED EMISSIONS TO DRIVE MARKET 110
  - 9.8 OTHER END-USE INDUSTRIES 111
    - 9.8.1 ELECTRONICS 111
    - 9.8.2 TEXTILE 111
    - 9.8.3 RENEWABLE ENERGY 112
- 10 SUSTAINABLE ADHESIVES MARKET, BY REGION 113
  - 10.1 INTRODUCTION 114
  - 10.2 NORTH AMERICA 116
    - 10.2.1 US 122
      - 10.2.1.1 Rising demand in packaging and construction industries to drive market 122
    - 10.2.2 CANADA 124
      - 10.2.2.1 Focus on sustainable development to boost market 124
    - 10.2.3 MEXICO 126
      - 10.2.3.1 Government's sustainability goals to drive demand 126
  - 10.3 EUROPE 128
    - 10.3.1 GERMANY 135
      - 10.3.1.1 High demand in automotive and packaging industries to drive market 135
    - 10.3.2 ITALY 137
      - 10.3.2.1 Expanding end-use industries to boost demand 137
    - 10.3.3 FRANCE 139

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

10.3.3.1	Government emphasis on sustainability to bolster market	139
10.3.4	UK	141
10.3.4.1	Rising demand in construction and automotive industries to propel market	141
10.3.5	SPAIN	143
10.3.5.1	Growing packaging industry to drive demand	143
10.3.6	REST OF EUROPE	145
10.4	ASIA PACIFIC	146
10.4.1	CHINA	153
10.4.1.1	Growing focus on sustainability across industries to drive demand	153
10.4.2	JAPAN	155
10.4.2.1	Emphasis on innovation and technological advancements to support market	155
10.4.3	INDIA	157
10.4.3.1	Strict environmental regulations to drive market	157
10.4.4	SOUTH KOREA	159
10.4.4.1	Increasing adoption in construction industry to boost market	159
10.4.5	REST OF ASIA PACIFIC	161
10.5	MIDDLE EAST & AFRICA	162
10.5.1	GCC COUNTRIES	168
10.5.1.1	UAE	168
10.5.1.1.1	Growing construction activity to fuel market	168
10.5.1.2	Saudi Arabia	170
10.5.1.2.1	Investments in infrastructure development to bolster market	170
10.5.1.3	Other GCC countries	172
10.5.2	SOUTH AFRICA	174
10.5.2.1	Growing demand in various end-use industries to boost market	174
10.5.3	REST OF MIDDLE EAST & AFRICA	176
10.6	SOUTH AMERICA	178
10.6.1	ARGENTINA	183
10.6.1.1	Availability of natural resources to drive market	183
10.6.2	BRAZIL	185
10.6.2.1	Strict environmental regulations to encourage adoption	185
10.6.3	REST OF SOUTH AMERICA	187
11	COMPETITIVE LANDSCAPE	190
11.1	INTRODUCTION	190
11.2	KEY PLAYER STRATEGIES/RIGHT TO WIN, JANUARY 2021-JULY 2025	190
11.3	MARKET SHARE ANALYSIS	192
11.3.1	MARKET SHARE OF KEY PLAYERS, 2024	192
11.4	REVENUE ANALYSIS, 2021-2025	194
11.5	BRAND/PRODUCT COMPARISON	195
	?	
11.6	COMPANY EVALUATION MATRIX: KEY PLAYERS, 2024	197
11.6.1	STARS	197
11.6.2	EMERGING LEADERS	197
11.6.3	PERVASIVE PLAYERS	197

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

11.6.4	PARTICIPANTS	197
11.6.5	COMPANY FOOTPRINT: KEY PLAYERS, 2024	199
11.6.5.1	Company footprint	199
11.6.5.2	Type footprint	200
11.6.5.3	End-use industry footprint	201
11.6.5.4	Raw material footprint	202
11.6.5.5	Region footprint	203
11.7	COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2024	203
11.7.1	PROGRESSIVE COMPANIES	203
11.7.2	RESPONSIVE COMPANIES	203
11.7.3	DYNAMIC COMPANIES	203
11.7.4	STARTING BLOCKS	204
11.7.5	COMPETITIVE BENCHMARKING: STARTUPS/SMES, 2024	205
11.7.5.1	Key startups/SMES	205
11.7.5.2	Competitive benchmarking of startups/SMES	206
11.7.6	COMPANY VALUATION AND FINANCIAL METRICS	208
11.8	COMPETITIVE SCENARIO AND TRENDS	209
11.8.1	PRODUCT LAUNCHES	209
11.8.2	DEALS	214
11.8.3	EXPANSIONS	219
11.8.4	OTHER DEVELOPMENTS	222
12	COMPANY PROFILES	224
12.1	KEY PLAYERS	224
12.1.1	BASF	224
12.1.1.1	Business overview	224
12.1.1.2	Products/Solutions/Services offered	225
12.1.1.3	Recent developments	226
12.1.1.3.1	Product launches	226
12.1.1.3.2	Expansions	227
12.1.1.4	MnM view	227
12.1.1.4.1	Right to win	227
12.1.1.4.2	Strategic choices	227
12.1.1.4.3	Weaknesses & competitive threats	227
12.1.2	HENKEL AG & CO. KGAA	228
12.1.2.1	Business overview	228
12.1.2.2	Products/Solutions/Services offered	229
	?	
12.1.2.3	Recent developments	230
12.1.2.3.1	Product launches	230
12.1.2.3.2	Deals	231
12.1.2.3.3	Expansions	233
12.1.2.4	MnM view	234
12.1.2.4.1	Right to win	234
12.1.2.4.2	Strategic choices	234
12.1.2.4.3	Weaknesses & competitive threats	235
12.1.3	H.B. FULLER COMPANY	236
12.1.3.1	Business overview	236

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

- 12.1.3.2 Products/Solutions/Services offered 237
- 12.1.3.3 Recent developments 238
  - 12.1.3.3.1 Product launches 238
  - 12.1.3.3.2 Deals 239
  - 12.1.3.3.3 Expansions 240
- 12.1.3.4 MnM view 240
  - 12.1.3.4.1 Right to win 240
  - 12.1.3.4.2 Strategic choices 241
  - 12.1.3.4.3 Weaknesses & competitive threats 241
- 12.1.4 OWAT SE 242
  - 12.1.4.1 Business overview 242
  - 12.1.4.2 Products/Solutions/Services offered 242
  - 12.1.4.3 Recent developments 243
    - 12.1.4.3.1 Product launches 243
    - 12.1.4.3.2 Deals 244
    - 12.1.4.3.3 Expansions 244
    - 12.1.4.3.4 Other developments 245
  - 12.1.4.4 MnM view 245
    - 12.1.4.4.1 Right to win 245
    - 12.1.4.4.2 Strategic choices 245
    - 12.1.4.4.3 Weaknesses & competitive threats 245
- 12.1.5 DOW 246
  - 12.1.5.1 Business overview 246
  - 12.1.5.2 Products/Solutions/Services offered 247
  - 12.1.5.3 Recent developments 248
    - 12.1.5.3.1 Product launches 248
    - 12.1.5.3.2 Deals 248
    - 12.1.5.3.3 Other developments 249
  - 12.1.5.4 MnM view 249
    - 12.1.5.4.1 Right to win 249
    - 12.1.5.4.2 Strategic choices 249
    - 12.1.5.4.3 Weaknesses & competitive threats 249
- 12.1.6 DUPONT 250
  - 12.1.6.1 Business overview 250
  - 12.1.6.2 Products/Solutions/Services offered 251
  - 12.1.6.3 Recent developments 252
    - 12.1.6.3.1 Other developments 252
    - 12.1.6.4 MnM view 252
      - 12.1.6.4.1 Right to win 252
      - 12.1.6.4.2 Strategic choices 253
      - 12.1.6.4.3 Weaknesses & competitive threats 253
- 12.1.7 ARKEMA 254
  - 12.1.7.1 Business overview 254
  - 12.1.7.2 Products/Services/Solutions offered 255
  - 12.1.7.3 Recent developments 256
    - 12.1.7.3.1 Product launches 256
    - 12.1.7.3.2 Deals 257

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

- 12.1.7.3.3 Other developments 258
- 12.1.7.4 MnM view 258
  - 12.1.7.4.1 Right to win 258
  - 12.1.7.4.2 Strategic choices 258
  - 12.1.7.4.3 Weaknesses & competitive threats 259
- 12.1.8 AVERY DENNISON CORPORATION 260
  - 12.1.8.1 Business overview 260
  - 12.1.8.2 Products/Solutions/Services offered 261
  - 12.1.8.3 Recent developments 262
    - 12.1.8.3.1 Product launches 262
    - 12.1.8.3.2 Deals 263
    - 12.1.8.3.3 Other developments 263
  - 12.1.8.4 MnM view 264
    - 12.1.8.4.1 Right to win 264
    - 12.1.8.4.2 Strategic choices 264
    - 12.1.8.4.3 Weaknesses & competitive threats 264
- 12.1.9 PARAMELT B.V. 265
  - 12.1.9.1 Business overview 265
  - 12.1.9.2 Products/Solutions/Services offered 265
  - 12.1.9.3 MnM view 266
    - 12.1.9.3.1 Right to win 266
    - 12.1.9.3.2 Strategic choices 266
    - 12.1.9.3.3 Weaknesses & competitive threats 266
- 12.1.10 SYNTHOS 267
  - 12.1.10.1 Business overview 267
  - 12.1.10.2 Products/Solutions/Services offered 267
    - ?
  - 12.1.10.3 Recent developments 268
    - 12.1.10.3.1 Product launches 268
    - 12.1.10.3.2 Other developments 268
  - 12.1.10.4 MnM view 268
    - 12.1.10.4.1 Right to win 268
    - 12.1.10.4.2 Strategic choices 269
    - 12.1.10.4.3 Weaknesses & competitive threats 269
- 12.1.11 ARTIENCE CO., LTD. 270
  - 12.1.11.1 Business overview 270
  - 12.1.11.2 Products/Solutions/Services offered 271
  - 12.1.11.3 Recent developments 272
    - 12.1.11.3.1 Product launches 272
    - 12.1.11.3.2 Expansions 273
    - 12.1.11.3.3 Other developments 273
  - 12.1.11.4 MnM view 274
    - 12.1.11.4.1 Right to win 274
    - 12.1.11.4.2 Strategic choices 274
    - 12.1.11.4.3 Weaknesses & competitive threats 274
- 12.1.12 SIKA AG 275
  - 12.1.12.1 Business overview 275

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

12.1.12.2	Products/Solutions/Services offered	276
12.1.12.3	Recent developments	277
12.1.12.3.1	Product launches	277
12.1.12.3.2	Deals	277
12.1.12.3.3	Expansions	278
12.1.12.3.4	Other developments	279
12.1.12.4	MnM view	279
12.1.12.4.1	Right to win	279
12.1.12.4.2	Strategic choices	279
12.1.12.4.3	Weaknesses & competitive threats	279
12.1.13	3M	280
12.1.13.1	Business overview	280
12.1.13.2	Products/Solutions/Services offered	281
12.1.13.3	Recent developments	282
12.1.13.3.1	Product launches	282
12.1.13.4	MnM view	283
12.1.13.4.1	Right to win	283
12.1.13.4.2	Strategic choices	283
12.1.13.4.3	Weaknesses & competitive threats	283
12.2	OTHER PLAYERS	284
12.2.1	ARTIMELT AG	284
12.2.2	FOLLMANN GMBH & CO. KG	285
12.2.3	LD DAVIS	286
12.2.4	EMSLAND GROUP	287
12.2.5	ECOSYNTHETIX INC	288
12.2.6	WEISS CHEMIE + TECHNIK GMBH & CO. KG	289
12.2.7	SELLEYS	290
12.2.8	AVEBE	291
12.2.9	MASTER BOND	292
12.2.10	KLEIBERIT SE & CO. KG	292
12.2.11	THE COMPOUND COMPANY	293
12.2.12	U.S. ADHESIVES, INC.	293
12.2.13	FRANKLIN INTERNATIONAL	294
12.2.14	PREMIER STARCH PRODUCTS PVT. LTD	294
12.2.15	C.B. ADHESIVES LTD	295
13	APPENDIX	296
13.1	DISCUSSION GUIDE	296
13.2	KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL	299
13.3	CUSTOMIZATION OPTIONS	301
13.4	RELATED REPORTS	301
13.5	AUTHOR DETAILS	302

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

**Sustainable Adhesives Market by Type (Recyclable Adhesives, Repulpable Adhesives, Renewable Adhesives, Biodegradable Adhesives, Green Adhesives, Others), Raw Material (Water-Based, Plant-Based, EVA-Based and Acrylic-Based, Others), End-use Industry (Packaging, Automotive, Medical, Woodworking, Consumer Goods, Construction, Others), and Region - Global Forecast to 2030**

Market Report | 2025-09-11 | 303 pages | MarketsandMarkets

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	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		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"/>		

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-05"/>
		Signature	<input type="text"/>