

## **Adhesion Promoters - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-07-01 | 120 pages | Mordor Intelligence

### **AVAILABLE LICENSES:**

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

### **Report description:**

Adhesion Promoters Market Analysis

The Adhesion Promoters Market size is estimated at USD 4.95 billion in 2025, and is expected to reach USD 5.77 billion by 2030, at a CAGR of 3.07% during the forecast period (2025-2030). Moderate expansion reflects a sector moving from rapid adoption to steady replacement demand as regulations tighten and sustainable chemistry gains ground. Investment in automotive lightweighting, relentless electronics miniaturization, and Asia-Pacific's flourishing flexible-packaging sector continue to anchor revenue. Suppliers with vertically integrated silane capacity are insulated from feedstock swings, positioning them to capture downstream value as electric vehicles multiply. Meanwhile, formulators that can align with stricter VOC thresholds without sacrificing bond strength are securing long-term contracts, particularly in construction and consumer goods. The adhesion promoters market therefore rewards players that pair molecular design expertise with localized production footprints in growth regions.

Global Adhesion Promoters Market Trends and Insights

Rising demand for lightweight automotive plastics and composites

Global vehicle platforms are migrating toward multi-material architectures that combine carbon fiber, glass fiber, aluminum, and high-strength steel. Covalent bonding across such dissimilar substrates hinges on silane, titanate, and zirconate promoters that tolerate thermal cycling beyond 150 C while curbing galvanic corrosion. Latest formulations enable a 15% curb-weight reduction

**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 crash metrics, directly supporting electric-vehicle range goals. As OEMs localize battery-pack lines, regional sourcing of adhesion promoters becomes a competitive differentiator, particularly in North America where compliance with Inflation Reduction Act content rules shapes supplier selection. The adhesion promoters market therefore embeds itself deeper into the automotive value chain each model year.

#### Electronics miniaturization and EV battery packaging needs

Foldable displays, camera lens stacks, and system-in-package boards call for ultra-thin adhesive layers able to flex thousands of times while remaining optically clear. Promoters engineered with low glass-transition monomers preserve transparency and suppress yellowing, enabling bezel-free smartphone designs. In parallel, cell-to-pack EV architectures eliminate conventional module walls; specialized promoters now link cells to cooling plates, withstanding -40 C to 85 C swings and inhibiting thermal-runaway propagation. These dual pressures speed adoption of thermally conductive, electrically insulating promoter chemistries, expanding the adhesion promoters market across consumer and mobility electronics.

#### Volatile silane and maleic-anhydride feedstock prices

Spot silane quotes swung 25% during 2024-2025 as energy-linked inputs and logistical bottlenecks rippled through Chinese producers. Maleic anhydride followed benzene and butane volatility, forcing formulators to renegotiate quarterly contracts. While tier-one suppliers accelerate backward integration, mid-size blenders pass surcharges downstream, eroding adhesive makers' margins. These dynamics shave nearly 1 percentage point from the adhesion promoters market CAGR until fresh capacity stabilizes supply late in the forecast window.

Other drivers and restraints analyzed in the detailed report include:

Expansion of flexible packaging converters in Asia / Shift to silane-based green-tire formulations / VOC and halogenated CPO regulatory pressure /

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

Silane-based products captured 39.18% of the adhesion promoters market size in 2024 and their 5.9% CAGR through 2030 underscores continued diversification into automotive, tire, and electronics substrates. Hydrolyzable alkoxy groups secure bonds to glass, metal oxides, and silica, while functional organics co-polymerize with epoxies, polyesters, or urethanes. This dual reactivity shortens assembly time and reduces the need for mechanical pretreatment. Next-generation silanes graft pendant imide or epoxy rings, enhancing high-temperature tolerance for battery pack and aerospace components. Maleic-anhydride grafted polyolefins remain indispensable in polypropylene surface modification but grow only where lower cost outweighs chlorinated alternatives. Titanate and zirconate promoters, though niche, win contracts in under-hood applications exceeding 200 C and in composites cured by autoclave cycles.

Competition now hinges on supply security; Evonik consolidated its silica and silane operations into the Smart Effects business line to synchronize upstream intermediates with customer-specific coupling agents. Smaller formulators are licensing these silanes to develop pre-condensed blends that cut user mixing errors. Environmental scrutiny is steering demand from chlorinated polyolefins toward non-halogenated grades compliant with emerging PFAS limits. As a result, dynamic rebalancing among chemistries will shape the adhesion promoters market across the decade.

The Adhesion Promoters Market Segments the Industry by Type (Silanes, Maleic Anhydride, Titanates and Zirconates, and More),

**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)

Application (Plastics and Composites, Paints and Coatings, and More), End-User Industry (Automotive and Transportation, Electrical and Electronics, and More) and Geography (Asia-Pacific, North America, Europe, and More). The Market Forecasts are Provided in Terms of Value (USD).

## Geography Analysis

Asia-Pacific dominated the adhesion promoters market with 47.38% revenue in 2024, propelled by automotive assembly clusters, electronics export bases, and swift urban infrastructure rollout. The region's flexible-packaging converters are racing to adopt electron-beam curing, a shift that requires promoters with rapid surface migration yet low odor Adhesives Magazine. Government incentives for light-duty EVs in China, India, and Indonesia add further pull, and domestic silane output shields regional buyers from exchange-rate shocks.

North America represents a mature but innovation-heavy arena where regulatory compliance shapes demand. California's VOC limits accelerated adoption of water-borne promoter systems, and the United States-Mexico-Canada Agreement favors localized chemical supply chains. Electric-pickup launches in Michigan and Texas validate promoters that survive winter freeze-thaw and hot-soak extremes, expanding contract volumes for specialty silicone-modified coupling agents. The adhesion promoters market therefore evolves here through specification upgrades rather than unit-growth spurts.

Europe remains tightly governed by environmental legislation, steering formulators to non-halogenated and bio-based promoters. Automotive green-tire mandates make silane suppliers strategic partners for OEMs chasing CO<sub>2</sub> fleet targets. Retrofit programs under the Renovation Wave initiative further lift consumption in building sealants that embed phosphate-ester promoters for adhesion to new-generation facade claddings. Despite modest GDP growth, the region's rigorous standards create premium pricing corridors that lift the adhesion promoters market size in revenue terms.

## List of Companies Covered in this Report:

3M / Arkema / Atlanta Group (BYK-Chemie GmbH) / BASF / Borica Co., Ltd / DIC Corporation / Dow / Eastman Chemical Company / EMS-CHEMIE Holding AG / Evonik Industries AG / Huntsman International LLC / Kemipex / Momentive / Nagase ChemteX Corporation / NIPPON PAPER INDUSTRIES CO., LTD. / Nouryon / ROWA GROUP Holding GmbH (TRAMACO GmbH) / ShinEtsu Microsi / Sika AG / Solvay / Toyobo Co. Ltd. / Wacker Chemie AG /

## Additional Benefits:

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

## Table of Contents:

- 1 Introduction
  - 1.1 Study Assumptions and Market Definition
  - 1.2 Scope of the Study
- 2 Research Methodology
- 3 Executive Summary
- 4 Market Landscape
  - 4.1 Market Overview

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

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

www.scotts-international.com

- 4.2 Market Drivers
  - 4.2.1 Rising Demand for Lightweight Automotive Plastics and Composites
  - 4.2.2 Electronics Miniaturisation and EV Battery Packaging Needs
  - 4.2.3 Expansion of Flexible Packaging Converters in Asia
  - 4.2.4 Shift to Silane-Based Green-Tire Formulations
  - 4.2.5 Increasing Usage in the Electrical and Electronics Industry
- 4.3 Market Restraints
  - 4.3.1 Volatile Silane and Maleic-Anhydride Feedstock Prices
  - 4.3.2 VOC and Halogenated CPO Regulatory Pressure
  - 4.3.3 Cost-Performance Gap of Bio-Based Promoters
- 4.4 Value Chain Analysis
- 4.5 Porter's Five Forces
  - 4.5.1 Bargaining Power of Suppliers
  - 4.5.2 Bargaining Power of Buyers
  - 4.5.3 Threat of New Entrants
  - 4.5.4 Threat of Substitutes
  - 4.5.5 Degree of Competition

## 5 Market Size and Growth Forecasts (Value)

- 5.1 By Type
  - 5.1.1 Silane
  - 5.1.2 Maleic Anhydride
  - 5.1.3 Titanate and Zirconate
  - 5.1.4 Chlorinated Polyolefins
  - 5.1.5 Non-chlorinated Polyolefins
  - 5.1.6 Other Types
- 5.2 By Application
  - 5.2.1 Plastics and Composites
  - 5.2.2 Paints and Coatings
  - 5.2.3 Rubber
  - 5.2.4 Adhesives
  - 5.2.5 Metal Substrates
  - 5.2.6 Other Applications
- 5.3 By End-Use Industry
  - 5.3.1 Automotive and Transportation
  - 5.3.2 Electrical and Electronics
  - 5.3.3 Packaging
  - 5.3.4 Consumer Goods
  - 5.3.5 Construction
  - 5.3.6 Others End-Use Industries
- 5.4 By Geography
  - 5.4.1 Asia-Pacific
    - 5.4.1.1 China
    - 5.4.1.2 India
    - 5.4.1.3 Japan
    - 5.4.1.4 South Korea
    - 5.4.1.5 Rest of Asia-Pacific

**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)

- 5.4.2 North America
  - 5.4.2.1 United States
  - 5.4.2.2 Canada
  - 5.4.2.3 Mexico
- 5.4.3 Europe
  - 5.4.3.1 Germany
  - 5.4.3.2 United Kingdom
  - 5.4.3.3 France
  - 5.4.3.4 Italy
  - 5.4.3.5 Rest of Europe
- 5.4.4 South America
  - 5.4.4.1 Brazil
  - 5.4.4.2 Argentina
  - 5.4.4.3 Rest of South America
- 5.4.5 Middle East and Africa
  - 5.4.5.1 Saudi Arabia
  - 5.4.5.2 South Africa
  - 5.4.5.3 Rest of Middle East and Africa

## 6 Competitive Landscape

### 6.1 Market Concentration

### 6.2 Strategic Moves

### 6.3 Market Share(%) / Ranking Analysis

### 6.4 Company Profiles (includes Global level Overview, Market level Overview, Core Segments, Financials, Strategic Information, Market Rank/Share, Products and Services, Recent Developments)

#### 6.4.1 3M

#### 6.4.2 Arkema

#### 6.4.3 Atlanta Group (BYK-Chemie GmbH)

#### 6.4.4 BASF

#### 6.4.5 Borica Co., Ltd

#### 6.4.6 DIC Corporation

#### 6.4.7 Dow

#### 6.4.8 Eastman Chemical Company

#### 6.4.9 EMS-CHEMIE Holding AG

#### 6.4.10 Evonik Industries AG

#### 6.4.11 Huntsman International LLC

#### 6.4.12 Kemipex

#### 6.4.13 Momentive

#### 6.4.14 Nagase Chemtex Corporation

#### 6.4.15 NIPPON PAPER INDUSTRIES CO., LTD.

#### 6.4.16 Nouryon

#### 6.4.17 ROWA GROUP Holding GmbH (TRAMACO GmbH)

#### 6.4.18 ShinEtsu Microsi

#### 6.4.19 Sika AG

#### 6.4.20 Solvay

#### 6.4.21 Toyobo Co. Ltd.

#### 6.4.22 Wacker Chemie AG

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

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

www.scotts-international.com

7 Market Opportunities and Future Outlook  
7.1 White-space and Unmet-need Assessment

**Adhesion Promoters - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-07-01 | 120 pages | Mordor Intelligence

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	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		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"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-26"/>
		Signature	

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

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

www.scotts-international.com

