

Adhesives, Sealants and Their Raw Materials

December 2025

Abstract

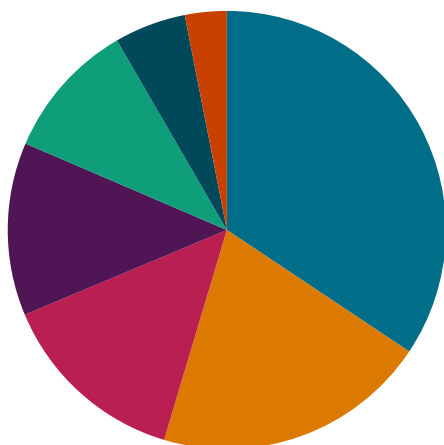
Total global production of adhesives was about \$52.8 billion in 2025, while production of sealants was worth \$12.5 billion. Asia-Pacific is the leading producer of adhesives and sealants, followed by Americas and the EMEA. During 2020–25, global growth averaged nearly 2.5%, but growth in 2025–30 should be somewhat higher at around 2.8%, as the world continues to rebound.

The major end uses for adhesives are presented in the following chart:

World consumption of adhesives by market — 2025

(volume basis)

- | | |
|-------------------------------------|-----------------------------|
| ■ Paper, board and related products | ■ Building and construction |
| ■ Product assembly | ■ Woodworking and joinery |
| ■ Transportation | ■ Consumer/DIY |
| ■ Footwear and leather | |



Data compiled Nov. 27, 2025.

Source: S&P Global Energy.

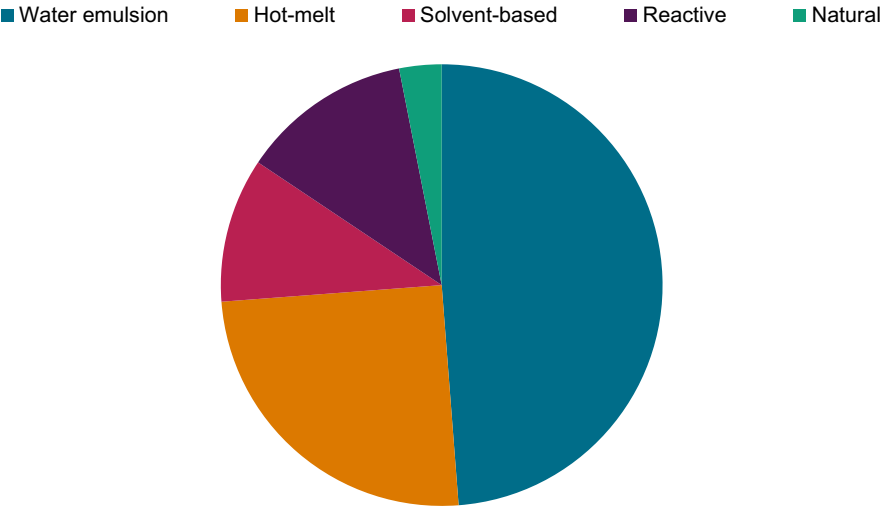
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There are many producers of adhesives and sealants because the technologies are well known and manufacture is not capital intensive. There are around 15 multinational producers, but most are regional suppliers. In North America and Western Europe, there is a trend toward consolidation, but in other parts of the world, small- to medium-sized producers dominate.

There are five major technologies used for adhesives — water emulsions, hot-melts, solvent-based, reactive and natural polymers. Water emulsions and hot-melts are the largest volume markets, as shown in the following chart:

World consumption of adhesives by technology — 2025

(volume basis)



Data compiled Nov. 27, 2025.
Source: S&P Global Energy.
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Growth is expected to be highest for reactives, typically those based on urethanes and epoxies, especially in transportation and construction.

Sealants are typically based on silicones and urethanes. Growth will be strong especially in construction in some regions because of stricter building codes that restrict heating/cooling losses. Also, more windows are being used for skylights and other spaces to create naturally illuminated atmospheres, and reduce the need for man-made lighting.

The industry is under pressure to improve sustainability and use raw materials that are biorenewable, reduce waste and facilitate recycling.

For more detailed information, see the table of contents, shown below.

S&P Global’s Chemical Economics Handbook – Adhesives, Sealants and Their Raw Materials is the comprehensive and trusted guide for anyone seeking information on this industry. This latest report details global and regional information, including



Global summary;
regional coverage



Producers with
annual capacities
and plant sites



Production figures
and trends



Consumption and
forecasts by end use
application



Manufacturing
processes and
environmental issues



Trade – imports
and exports

Key benefits

S&P Global's Chemical Economics Handbook – Adhesives, Sealants and Their Raw Materials has been compiled using primary interviews with key suppliers and organizations, and leading representatives from the industry in combination with IHS Markit's unparalleled access to upstream and downstream market intelligence and expert insights into industry dynamics, trade and economics.

This report can help you

- Identify trends and driving forces influencing chemical markets
- Forecast and plan for future demand
- Understand the impact of competing materials
- Identify and evaluate potential customers and competitors
- Evaluate producers
- Track changing prices and trade movements
- Analyze the impact of feedstocks, regulations and other factors on chemical profitability

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