

## German adhesives industry cautiously optimistic

After a mixed 2024, the German adhesives industry is showing cautious optimism for 2025, with international business stabilising but domestic demand still under pressure. IVK e.V. reports that while sales of adhesives, tapes and cementitious products declined in Germany, growing interest in adhesive-based solutions for the circular economy is opening new avenues for sustainable growth.



After a mixed financial year in 2024, the German adhesives industry is cautiously optimistic about 2025, according to information from IVK e.V. While international business is showing signs of stabilisation, the domestic situation remains tense. Geopolitical uncertainties, new trade barriers and complex regulatory requirements continue to pose major challenges for companies.

German adhesive manufacturers achieved global sales of around €13.6 billion in 2024—an increase of 2.3% compared with the previous year—indicating a slight global recovery. In Germany, however, the downward trend persisted: Adhesive sales fell by 2.8%, adhesive tapes declined by 1.9% and cementitious products by as much as 6.1%. The production volume of adhesives also dropped by 1.0%.

The German adhesives industry generated sales of just under €1.8 billion from adhesives alone. Combined with sealants, cementitious construction adhesives and adhesive tapes, total sales reached just under €4.1 billion in 2024. Employment figures developed slightly positively: After a significant decline in 2023, the number of employees stabilised in 2024. Around 18,000 people are currently employed in the German adhesives industry—an increase of 0.9%—while

global employment stands at around 51,800 (+0.4%). Approximately 70% of IVK member companies are small and medium-sized enterprises with fewer than 500 employees.

Despite the difficult conditions, IVK expects a moderate market recovery in 2025. Advance effects related to U.S. tariff policy ensured a satisfactory start to the year. The recent E.U.–U.S. tariff agreement could ease trade tensions somewhat; however, given continued consumer caution, no significant economic upturn is yet in sight. At the same time, demand for adhesive-based solutions for a sustainable circular economy is gaining increasing importance.

The adhesives industry plays a largely underestimated but crucial role in achieving the E.U.'s ambitious circular economy goals. The focus lies on the 'R' strategies—from *refuse* to *recycle*—which serve as a compass for resource-efficient product design and sustainable value chains. The contribution of adhesive technology to sustainable transformation can be clearly illustrated through these strategies:

- **R1 – Rethink:** Adhesives are transforming how we conceive of products. By forming highly durable bonds, they extend the service life of vehicles, wind turbines and electronics—making durability a design principle.
- **R2 – Reduce:** Less is more—thanks to adhesive technology. It enables lightweight design and miniaturisation, reduces material use and lowers energy consumption.
- **R3–R6 – Reuse, Repair, Refurbish, Remanufacture:** Whether in furniture or high-tech components, adhesives are essential for repair and reuse. The standard DIN/TS 54405 establishes clear requirements for the separability of bonded joints, paving the way for second-life products.
- **R8 – Recycle:** Recycling starts at the design stage. Today, adhesives can be developed specifically for mechanical and chemical recycling processes—provided recyclability is considered early in product development.

In this context, adhesive technology is far more than a technical detail—it is a key innovation driver, enabling the development of durable, repairable and recyclable products.

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