

# Global Packaging Adhesives Market Outlook to 2027

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## Abstracts

The paper and packaging industry is one of the largest users of industrial adhesives. An extensive range of industrial products is sold in packaging due to stability requirements for storage & transport and aesthetic reasons. According to BlueQuark Research & Consulting, the global packaging adhesives market is expected to witness a moderate growth rate during the forecast period. Significant growth in the packaged food and beverage industry is the largest market driving factor, coupled with an increase in food-related safety awareness among consumers. However, stringent government regulations to reduce the production and consumption of volatile organic compounds (VOCs) are expected to hinder the market growth during the forecast period.

As the developing economies of the world, including China, Brazil, and India, become wealthier, their eating habits are also changing. The people in these nations are leaning towards packaged food. In 2019, the size of the global processed food market was more than USD 3 trillion, and nearly 80% of agricultural products in the developed countries get processed and packaged. With changing demographics, there is an increase in the population of emerging cities, together with changes in lifestyle and food habits of consumers. According to the World Bank data in 2019, 55.7% of the total population was urban. This has led to a shift from traditional food to the adaption of packaged food. In developing countries such as India, the packaged processed food industry is estimated to be around USD 11 billion by the end of 2020. According to the Indian Institute of Packaging, the packaged food sector is growing at around 14%.

The most important factor affecting the packaged food and beverage industry is rapid urbanization. Increasing urbanization has increased the number of nuclear families and the rise in the percentage of working women, which has increased the consumption and reliance on easy to prepare or ready to make food. For instance, in the European Union (EU), almost half of the women were employed in 2018. Increasing globalization has increased the experimentation with new cuisines among the urban population as they

become more aware of products globally. An increase in demand for various ingredients and beverages to satisfy the growing customer demand has dramatically changed the demographic for packaged food and beverages. In addition to this, advertisements on television and social media by the manufacturers of the packaged foods and beverages are making the consumers aware of the new product launches along with their USP. Along with growing awareness, easy accessibility is boosting the consumption of packaged food and beverages. A rise in health consciousness and self-management of wellness has increased the consumption of healthy packaged foods due to their promised health benefits or the use of natural ingredients. India has the largest population of young people globally, with around half of the total population under the age of 25 becoming highly health-conscious and aware of advancements in packaged food and industry. Furthermore, the high trust of consumers in branded packaged foods and beverages due to the strict quality assurance by the manufacturers is increasing the consumption of packaged food and beverages.

Battelle and Mondelez International have co-developed an innovative new technology for reclosable packaging known as a low-tack adhesive (LTA) that offers better usability for consumers and provides a cost-competitive innovation for packaging manufacturers. Both the companies completed a seven-year process of analysis, formulation, and testing of the product to perfect the synthetic blend that makes LTA effective and compatible with a vast array of manufacturing processes. Unlike conventional pressure-sensitive adhesives, LTA is not tacky or messy. It does not collect crumbs, dust, or other product pieces that render traditional adhesives ineffective. LTA is also less expensive and easier to manufacture than other reclosable packaging solutions, such as zippers.

The global Packaging Adhesives market is segmented based on Technology and Application. The Application segment is further segmented as Corrugated Packaging, Cartons & Boxes, Labeling, Flexible Packaging, and Others. By technology type, water based adhesive is expected to be the largest market shareholder due to their environmental friendliness. VOC norms have led to phasing out of the solvent based adhesive resulting in providing a bigger opportunity to water-based adhesives consisting of an organic binder (mainly PVAc) that is finely dispersed in water.

Flexible packaging is a less-expensive, higher-value form of packaging that offers excellent durability and product protection. Flexible packaging is used from fast-moving consumer and sporting goods to electronics, cosmetics, and medical supplies. It is a key material in the supply chain of many industries and products. According to the Flexible Packaging Association, in 2018, more than 80% of all brand owners used

flexible packaging of some type. Furthermore, 26% of all brands have increased their usage of flexible packaging from 2012, and 31% intend to increase their flexible packaging usage by 2023. These packaging can be tailored to fit the specifics of any shape and size product. Flexible sacks and bags ensure the safe transport of goods such as free-flowing bulk material and protect it from mechanical stress and moisture.

Several innovative flexible packaging types are being approved by the US Food and Drug Administration (FDA) as an alternative to conventional packaging. For instance, polyolefin shrink films are a popular high-quality material that can increase the shelf life of food and beverages. The adhesives used in flexible packaging have superior feed properties, are easy to clean, provide permanent & reliable adhesion to different substrates, and meet the demands of food contact regulations if required. The demand for flexible packaging has significantly increased in the fruits and vegetable sectors due to reduced package weight and an increase in shelf life. Moreover, flexible packaging is a crucial component of rapidly expanding high-pressure pasteurization technology in milk, juices, and sauces. Pouches are extensively used as a replacement for traditional glass and cans in the center of the stores, plus pouches used in E-commerce hold up very well to air pressures and dropping through the logistics channels. Multiple new advancements and innovations are being carried out in the flexible packaging adhesives market. Recently, PepsiCo and Danimer Scientific co-developed a liner of biodegradable resins appropriate for use in films for PepsiCo's global food and beverage businesses. Similarly, Flex Films introduced a pouch for fresh-cut flowers that keeps the flowers fresh in a closed pouch with an engineered film that allows the package to respire during transportation.

Based on geography, the global Packaging Adhesives Market is segmented into Asia Pacific, North America, South America, Europe, and Middle East & Africa. The Asia Pacific is expected to be the dominant region in the forecasted period due to rapid growth in the packaged food industry along with online food services in countries like China, Japan, and India. Moreover, growth in eCommerce is also expected to impact market growth positively.

Germany's economy shrank by 2.2% in the first quarter of 2020 due to the ongoing coronavirus pandemic. Moreover, the economy further declined by 10.1% in the second quarter. The packaging adhesive market in Germany is mainly driven by the high consumption of paper and cardboard in the country. The average German uses more paper and cardboard than any other country in the G20. Germany uses around 240 kilograms of paper per person. The use of recycled paper in the country rose to approximately 75% in recent years. Nearly 43% of the paper produced in the country

goes into packaging. The packaging industry in the country caters to eCommerce, food & beverages, personal care products, and pharmaceuticals, among others. The growing online retail market is fueling paper consumption in the country, which in turn is fueling the market growth of packaging adhesives industry. Germany is the fifth-largest market for eCommerce in the world. According to the study conducted by the Federal Association of German, eCommerce turnover in 2019 rose by a full 11% as compared to 2018 and thus amounts to approximately EUR 94 billion. Furthermore, eCommerce in Germany is expected to be worth EUR 103.4 billion at the end of 2020.

Germany is one of the most mature eCommerce markets in Europe. Nearly 88% of Germans use online shopping for their purchases. This gives a lot of opportunities to brands and online stores. The food industry in Germany represents the third-largest processing industry in Germany. Products like highly processed ingredients, dried fruits, bakery products, and seafood have high potential in the German market. With around 83 million of the world's wealthiest consumers, Germany is the biggest market for food and beverages in the European Union. Germany is the home for about 6,000 food processing companies, and the food processing sector accounts for around 6% of the German GDP. The ongoing COVID-19 pandemic has increased awareness among consumers, leading to growth in the organic packaged food market. The rise in the consumption of organic dairy products is one of the primary growth factors for the organic packaged food market in Germany. Moreover, increasing health awareness about the health benefits of organic milk has encouraged the consumption of organic dairy products. Germany is also the best international location for the research, production, and distribution of pharmaceuticals at an exceptionally high level.

In the year 2019, the market was found to be partially consolidated. Some of the key players in the global market are 3M , Henkel AG & Co. KGaA , H.B. Fuller Company , and Arkema Group , among others.

Our Global Packaging Adhesives market report provides deep insight into the current and future state of the Packaging Adhesives market across various regions. Also, the study comprehensively analyzes the Packaging Adhesives market by segments based on Technology (Water-based, Solvent-based, Hot Melt, and Others), and By Application (Corrugated Packaging, Cartons & Boxes, Labeling, Flexible Packaging, and Others), and by Geography (Asia Pacific, North America, Europe, South America, and Middle-East and Africa). The report examines the market drivers and restraints, along with the impact of Covid-19 are influencing the market growth in detail. The study covers & includes emerging market trend, market developments, market opportunities, market size, market analysis, market dynamics, and challenges in the industry. This report also

covers extensively researched competitive landscape sections with profiles of major companies, including their market share and projects.

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Fuller Company

Hera Group

Henry Dennison Corporation

Indat SE

Isopon Chemie AG

Land Global Specialty Chemicals Inc.

Oramelt RMC B.V.

Oramelt AG

Richardson Adams Ltd.



*Companies is not exhaustive*

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Packaging Adhesives – Market Share of Key Companies in 2020

food and beverage Industry Growth Data, 2013-2020

Packaging Industry Growth Data, 2013-2020

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