

Global Paper Strength Agent Market Research Report 2026(Status and Outlook)

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Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Paper Strength Agent competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. Paper strength agents are a class of papermaking chemicals used to improve the physical properties of paper (such as dry strength, wet strength, bursting strength, and folding endurance). They enhance fiber bonding by forming stronger hydrogen or covalent bonds between fibers, thereby improving the overall strength and durability of the paper. Typically added at the wet end of the papermaking process, they significantly improve paper sheet structural stability, water resistance, and processability, while reducing raw material fiber consumption and lowering production costs. Paper strength agents are widely used in packaging paper, corrugated paper, cultural paper, and tissue paper, and are one of the essential key functional additives in the modern papermaking industry. Sales volume in 2024 was 450,000 tons, with an average price of US\$1,250 per ton. Single-line production capacity was 50,000 tons, with a gross profit margin of 44%. I. by System Components Classification by Application Area

Packaging Paper: Used in corrugated paper and linerboard to improve burst strength, ring crush strength, and tensile strength; the largest global consumer application.

Cultural Paper: Improves paper surface strength, sizing quality, and printability, reducing dusting and lint.

Tissue Paper: Improves the balance between softness and strength, making tissues less prone to tearing when wet.

Specialty Paper: Includes filter paper, food packaging paper, oil- and water-resistant paper, medical paper, etc., requiring higher performance from reinforcing agents.

Classification by Technical Characteristics

Dry Strength Agents: Representative products: cationic starch, CPAM, APAM.

Wet Strength Agents: Representative products: PAE, formaldehyde-free wet strength agents.

Surface Reinforcing Agents: Representative products: sizing resin,

surface PAM.II. Application Case SharingA large corrugated paper manufacturing group decided to reduce the proportion of wood pulp and increase the amount of recycled fiber due to rising raw material costs. However, the paper experienced strength problems such as decreased burst strength and insufficient ring crush. In 2023, the factory introduced a "high-efficiency cationic starch + CPAM" composite reinforcement system. Through optimized matching of strength agents and fiber charges, fiber bonding efficiency was improved by 35%. After system application: corrugated paper burst strength increased by 18%, ring crush strength increased by 12%; pulp costs decreased by 8%; production line speed increased by 10%; formula debugging cycle shortened by 60%, and paper quality fluctuations significantly reduced. The factory achieved dual optimization of "cost reduction and performance improvement" for the first time, with reinforcement agents becoming one of the core means of cost reduction and efficiency improvement.III. Upstream and Downstream AnalysisUpstream: Chemical raw materials and polymer materials, starch raw materials, potato/corn starch, acrylamide, epichlorohydrin and other polymer monomers, bio-based raw materials and natural polymers. Midstream: Paper chemical manufacturers and system integrators. Downstream: Paper companies, including packaging paper mills, cultural paper mills, tissue paper mills and specialty paper mills.IV. Technological Trends and Innovation DirectionsHigh-efficiency with low addition: Through structural optimization, stronger fiber charge matching is achieved, reducing usage by 20-40%. Formaldehyde-free wet-strength agents are rapidly replacing traditional PAE: compliant with European and American food contact regulations, with a growth rate exceeding 12%. Bio-based strength agents are becoming mainstream: represented by lignin, alginate, and plant polysaccharides, they are more environmentally friendly and renewable. Fiber-filler-auxiliary agent ternary synergistic technology: used in high-filler paper, reducing filler dusting and improving paper surface performance. Online monitoring and intelligent dosing systems: through factory digitalization, optimizing strength agent dosing and predicting performance, improving stability.

The global Paper Strength Agent market size was estimated at USD 562.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 8.00% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Paper Strength Agent market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Paper Strength Agent market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Paper Strength Agent market.

Global Paper Strength Agent Market: Market Segmentation Analysis

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

Key Company

Seiko PMC
Kemira
BASF
Harima Chemicals
Asahi Kasei
Solenis
Kurita
Arakawa Chemical Industries, Ltd.

Ecolab
Borregaard
Jiangsu Sanrui
Shandong Nuocer Biological Technology Co., Ltd.
Axchem Korea
Mare Austria GmbH
OCHS Chemical

Market Segmentation (by Type)

Wet Strength Agent
Dry Strength Agent

Market Segmentation (by Application)

Paper
Paper Board
Others

Geographic Segmentation

North America (USA, Canada, Mexico)

Europe (Germany, UK, France, Russia, Italy, Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)

South America (Brazil, Argentina, Columbia, Rest of South America)

The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study
Neutral perspective on the market performance
Recent industry trends and developments

Competitive landscape & strategies of key players
Potential & niche segments and regions exhibiting promising growth covered
Historical, current, and projected market size, in terms of value
In-depth analysis of the Paper Strength Agent Market
Overview of the regional outlook of the Paper Strength Agent Market:

Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Paper Strength Agent Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help

readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Paper Strength Agent, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth

as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

Customization of the Report

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