

Global Solventless Flexible Packaging Laminating Adhesives 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 Solventless Flexible Packaging Laminating Adhesives competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. Solventless laminating adhesives are a class of adhesives used in flexible packaging that do not contain organic solvents in their formulation. Unlike solvent-based systems, they rely on reactive components—typically two-component polyurethane (2K PU) systems—that undergo a chemical reaction to form a strong bond between substrate layers. These adhesives are applied as liquids and cure without the need for drying ovens, as there are no volatile compounds to evaporate. In flexible packaging, Solventless laminating adhesives are used to bond layers of films such as polyethylene (PE), polypropylene (PP), polyethylene terephthalate (PET), aluminum foil, and paper. These multilayer structures provide essential properties such as barrier performance, heat resistance, durability, and aesthetic appeal. The key advantages of Solventless adhesives include low environmental impact, reduced energy consumption, no VOC emissions, and compliance with increasingly strict food contact safety regulations. The flexible packaging Solventless laminating adhesive market is expanding steadily as environmental, regulatory, and sustainability pressures reshape packaging technology. Solventless adhesives offer a clean, efficient, and safe solution for creating high-performance laminated structures. As the performance gap with traditional solvent-based adhesives continues to close—thanks to chemical innovations and process improvements—Solventless systems are set to become the dominant technology in flexible packaging lamination over the next decade. Their adoption is driven not only by compliance, but also by the promise of lower operational costs, faster processing, and alignment with circular packaging models. One of the strongest drivers

for Solventless adhesive adoption is environmental regulation. Solvent-based adhesives release volatile organic compounds (VOCs) during the drying process, contributing to air pollution and workplace hazards. Regulatory agencies worldwide, especially in the EU and parts of Asia, have imposed stricter VOC emission limits, making Solventless systems an attractive alternative. The absence of solvents not only simplifies compliance but also reduces the need for costly emissions control systems in packaging plants. Solventless adhesives align well with global sustainability goals. They reduce the carbon footprint of the lamination process by eliminating the need for high-temperature drying ovens and reducing energy use. Additionally, these adhesives support the development of recyclable mono-material flexible packaging, as their formulation can be optimized to enable cleaner recycling and lower contamination. With consumer brands increasingly prioritizing green packaging, Solventless adhesives are gaining traction in food, personal care, and household product sectors. Modern Solventless adhesive systems have overcome many of the limitations that previously hindered their use, such as long curing times, limited heat resistance, or poor wettability on certain films. Today's formulations provide fast initial tack, high bond strength, broad substrate compatibility, and excellent transparency. Manufacturers have also developed systems that can cure rapidly at room temperature, allowing converters to slit and rewind laminated rolls within hours, reducing turnaround time and improving productivity.

The global Solventless Flexible Packaging Laminating Adhesives market size was estimated at USD 2476.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 5.40% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Solventless Flexible Packaging Laminating Adhesives 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 Solventless Flexible Packaging Laminating Adhesives 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 Solventless Flexible Packaging Laminating Adhesives market.

Global Solventless Flexible Packaging Laminating Adhesives 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

Henkel
Arkema
H.B. Fuller
Rockpaint
Mitsui Chemicals
3M
UFlex
Sika Automotive
Wanhua
Lushan
Sungdo
DIC Corporation
Huber Group
Comens Material

China Neweast
Jiangsu Lihe
Morchem SA
Shanghai Kangda
Brilliant Polymers

Market Segmentation (by Type)

Two-Component Polyurethane Type
One-Component Hot Melt Type
UV Curing Type

Market Segmentation (by Application)

Food & Beverages
Daily Chemical Products
Electronic Products
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 Solventless Flexible Packaging Laminating Adhesives Market
Overview of the regional outlook of the Solventless Flexible Packaging Laminating Adhesives 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 Solventless Flexible Packaging Laminating Adhesives 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 Solventless Flexible Packaging Laminating Adhesives, 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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