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Global Adhesives for Corrugated Board Supply, Demand and Key Producers, 2026-2032

https://marketpublishers.com/r/GE3BB7588160EN.html
Date: November 2026
Pages: 126
Price: US$ 4,480.00 (Single User License)
ID: GE3BB7588160EN

Abstracts

The global Adhesives for Corrugated Board market size is expected to reach $ 503 million by 2032, rising at a market growth of 4.4% CAGR during the forecast period (2026-2032).

Adhesives for Corrugated Board are industrial bonding materials formulated for the manufacture and lamination of corrugated board, primarily creating durable bonds between fluting medium and linerboard during single-facer and double-backer operations. The market is centered on starch-based systems formulated from corn, wheat, tapioca, potato or other starch sources, together with water, alkali, borate or borate-replacement chemistry, crosslinkers, water-resistance agents and performance additives. Commercial products are supplied as prepared liquid adhesives, dry blends, One-Bag-Mix products, ready-mix formulations and specialized modified-starch systems, while large corrugating plants may prepare adhesive on site using dedicated glue kitchens. Key performance characteristics include viscosity stability, gelatinization temperature, wet tack, green-bond strength, penetration, water resistance, solids content, drying behavior and suitability for high-speed corrugators. The research scope focuses on adhesives commercially formulated for corrugated-board bonding and associated industrial lamination processes, covering standard, high-speed, quick-setting, water-resistant, wet-strength, low-temperature and other performance grades used in single-wall, double-wall, triple-wall and specialty corrugated board production.

Key Findings

The 2025 reference average price for Adhesives for Corrugated Board is approximately US$780 per tonne

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Starch-based systems remain the dominant bonding technology in corrugator production

One-Bag-Mix and ready-mix formats are expanding where process consistency and simplified glue preparation are priorities

Food packaging represents more than 40% of corrugated packaging use in Europe

Market Trends

The development of Adhesives for Corrugated Board is increasingly oriented toward higher corrugator productivity rather than simply higher adhesive strength. Formulators are focusing on faster initial bonding, lower and more stable gelatinization temperatures, higher solids, improved viscosity control, reduced glue application, better penetration control and stronger bonding to lightweight or recycled containerboard. This direction reflects the increasing use of recycled fibers, lighter basis-weight papers and higher operating speeds, all of which narrow the process window for conventional starch formulations. Water-resistant and wet-strength grades are also becoming more important for fruit and vegetable packaging, chilled and frozen foods, export packaging and other moisture-intensive applications. At the same time, One-Bag-Mix, ready-mix and other simplified preparation systems are gaining relevance because they can reduce formulation variability, shorten preparation cycles and lower the technical burden on the glue kitchen. Sustainability development is primarily occurring through renewable starch feedstocks, lower adhesive consumption, reduced energy requirements and formulation optimization rather than through wholesale replacement of starch chemistry.

Market Dynamics

Drivers

Demand for Adhesives for Corrugated Board is fundamentally linked to corrugated-board production and therefore benefits from the large installed packaging base serving food and beverages, e-commerce, consumer goods, electronics and industrial distribution. Beyond underlying packaging volume, productivity improvement is an important demand driver: faster corrugators, lighter containerboard and increasing recycled-fiber content require tighter control of adhesive rheology, gelatinization and green bond development. Corrugated packaging also benefits from its established

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recycling infrastructure and paper-based material profile, supporting continued investment in corrugated converting capacity. In Europe alone, approximately 49 billion square meters of corrugated board are produced annually, illustrating the scale of the downstream production base supporting adhesive consumption.

Restraints

The market remains highly price-sensitive because starch-based bonding is already an established, comparatively economical technology and many large corrugators operate their own glue kitchens. This limits the addressable value of fully prepared adhesives and encourages customers to compare formulations on total cost-in-use rather than nominal price. Corn, wheat, tapioca and other starch prices, as well as alkali, specialty resins and logistics costs, can affect producer margins and contract pricing. Industrial starch availability can also tighten when competing starch derivatives absorb available processing capacity. In addition, the long operating history of conventional in-house recipes creates switching inertia, particularly where existing formulations already perform adequately on mature production lines.

Opportunities

The strongest commercial opportunities lie in performance grades that generate measurable productivity benefits for converters. High-speed, low-temperature, high-solids and quick-setting systems can support higher line speeds or lower thermal demand, while wet-strength and water-resistant formulations address increasingly demanding food, produce, refrigerated and export packaging conditions. One-Bag-Mix and ready-mix products create another opportunity among converters seeking more consistent glue preparation, lower dependence on skilled operators and easier process standardization across multiple plants. Formulation technologies optimized for lightweight and high-recycled-content papers are also positioned to capture value as converters reduce board weight while maintaining compression strength and bonding integrity.

Challenges

Adhesive suppliers must simultaneously manage viscosity, gel point, solids content, penetration, initial tack, drying behavior and final bond strength across different paper grades, flute profiles, operating speeds and climatic conditions. A formulation that

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performs well on one corrugator may require adjustment when recycled-fiber content, paper sizing, moisture, temperature or machine speed changes. This application sensitivity makes technical service and process know-how important competitive capabilities. Producers also face the challenge of demonstrating that premium formulations generate sufficient savings in glue consumption, energy, waste reduction or machine productivity to justify a higher unit price in a market where conventional starch formulations remain highly cost competitive.

Industry Chain Analysis

The upstream chain for Adhesives for Corrugated Board begins with agricultural feedstocks such as corn, wheat, cassava and potatoes, which are processed into native and modified starches. Additional inputs include water, sodium hydroxide, borate chemistry or borate-replacement systems, crosslinkers, water-resistance resins, rheology modifiers, defoamers, preservatives and other functional additives. Starch availability and agricultural commodity pricing influence the basic cost structure, while specialty additives account for a smaller share of formulation volume but contribute disproportionately to differentiated performance. Corn starch remains an important reference raw material globally, although wheat and other regional starch sources retain meaningful positions depending on local agricultural economics and formulation practices.

Midstream value creation occurs through starch modification, formulation design, dry blending, liquid preparation, application testing and technical service. Suppliers may sell complete prepared adhesives, One-Bag-Mix powders, ready-mix products or specialized starch systems for customer-side preparation. Downstream customers are corrugated-board producers, integrated board-and-box plants, sheet feeders and packaging converters. Adhesive is applied at the flute tips in the single facer and again when the outside liner is bonded at the double facer, making bonding performance directly relevant to corrugator throughput and finished-board quality. Because adhesive represents a relatively small portion of overall board manufacturing economics but can materially affect line speed, waste, energy consumption and quality, higher-value suppliers compete increasingly on process economics and technical support rather than raw-material cost alone.

Segment Insights

Starch-Based Adhesives constitute the core product segment of Adhesives for

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Corrugated Board and remain the technological benchmark because of their cost efficiency, compatibility with paper fibers, rapid thermal gelatinization and renewable raw-material base. Within this segment, conventional native-starch formulations continue to account for the largest volume, while modified-starch and performance-enhanced formulations capture higher-value applications. Corn starch holds a particularly important position internationally, while wheat, tapioca and potato systems are more prominent in selected regional markets. Synthetic or polymer-enhanced formulations occupy a smaller role and are concentrated in specialized lamination, moisture resistance or converting requirements rather than replacing starch across mainstream corrugator operations.

By supply format, traditional plant-prepared adhesive remains important among large integrated corrugators with established glue kitchens. However, One-Bag-Mix, dry ready-mix and other standardized products offer stronger growth potential where customers prioritize repeatability, shorter preparation time and reduced formulation complexity. Performance segmentation is also becoming more commercially significant: high-speed, low-temperature, quick-setting and water-resistant grades can command greater value because their economics are linked to corrugator productivity, energy consumption, adhesive mileage and board quality rather than simply adhesive volume. Roquette and AGRANA, for example, currently maintain commercial one-bag or ready-mix solutions designed for simplified corrugated-board adhesive preparation.

Downstream Market Opportunities

Food and beverage packaging remains one of the most important downstream demand pools because corrugated containers combine transportation protection, stackability, printability and compatibility with established recycling systems. In Europe, food products account for more than 40% of corrugated packaging use, while e-commerce is creating additional requirements for lighter, right-sized and increasingly printable shipping formats. For Adhesives for Corrugated Board, the higher-value opportunity is particularly attractive in fresh produce, cold-chain food, seafood, refrigerated products and export logistics, where water resistance and wet-strength retention become more important. E-commerce, electronics and industrial distribution provide a different opportunity, emphasizing high-speed production, consistent board flatness, reliable bonds and lightweighting. Consequently, adhesive demand is shifting gradually from a purely volume-linked consumable toward a process-performance input capable of supporting differentiated packaging specifications.

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Regional Insights

North America represents a large, mature demand base characterized by highly industrialized corrugating operations, extensive containerboard integration and significant use of corn-starch-based formulations. U.S. corrugated industry shipments reached approximately 381 billion square feet in 2024, while single-wall board represented 89.8% of production, supporting substantial recurring demand for standard high-throughput corrugating adhesives. Europe is similarly mature but places greater emphasis on recycled-fiber utilization, material efficiency and process sustainability. FEFCO reports approximately 49 billion square meters of annual corrugated-board production and indicates that around 88% of European corrugated packaging is derived from recycled content, increasing the importance of formulations that maintain bond performance across variable recycled papers.

Asia-Pacific is a major strategic growth and manufacturing region for Adhesives for Corrugated Board because of its extensive corrugated converting capacity, manufacturing export base and expanding domestic packaged-goods and e-commerce industries. The region also exhibits greater diversity in starch feedstocks and production practices, creating opportunities for both localized commodity formulations and higher-performance standardized systems. Emerging markets in Southeast Asia, India, Latin America and other developing packaging regions offer additional potential for One-Bag-Mix and simplified adhesive technologies where converters seek higher corrugator productivity without building highly sophisticated glue-kitchen capabilities. Regional competition therefore depends heavily on local starch economics, technical-service coverage and proximity to corrugated-board production clusters.

Competitive Landscape Analysis

The competitive landscape of Adhesives for Corrugated Board is fragmented and technically differentiated rather than dominated by a single global adhesive platform. The supplier base includes multinational starch specialists with integrated raw-material positions, dedicated corrugating-adhesive formulators, packaging-chemical companies and regional manufacturers serving local corrugator clusters. Confirmed market participants span companies such as Roquette Group, Crespel & Deiters Group, Goma Starch Adhesive, HarperLove, Bond Tech Industries, National Adhesives, Greif, AGRANA Stärke GmbH and established regional Chinese suppliers. Competition is based less on headline adhesive strength than on total operating economics: starch sourcing, formulation consistency, gelatinization control, machine-speed compatibility,

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adhesive mileage, water resistance and field technical support. Companies with integrated starch production can benefit from raw-material knowledge and supply-chain scale, while specialist formulators compete through application know-how, customized recipes and rapid troubleshooting at customer sites. Greif additionally operates dedicated U.S. adhesive manufacturing facilities for paper and corrugated applications, illustrating the strategic integration of adhesive production into downstream paper-packaging operations.

Report Scope

This report studies the global Adhesives for Corrugated Board production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Adhesives for Corrugated Board and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Adhesives for Corrugated Board that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Adhesives for Corrugated Board total production and demand, 2021-2032, (Kilotons)

Global Adhesives for Corrugated Board total production value, 2021-2032, (USD Million)

Global Adhesives for Corrugated Board production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Adhesives for Corrugated Board consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Adhesives for Corrugated Board domestic production, consumption, key domestic manufacturers and share

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Global Adhesives for Corrugated Board production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Adhesives for Corrugated Board production by Chemical Raw Materials, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Adhesives for Corrugated Board production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Adhesives for Corrugated Board market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Roquette Group, Crespel & Deiters Group, Ba?ar Ticaret ve G?da Sanayi A.?. (Goma), HarperLove, Bond Tech Industries, National Adhesives, Greif, S.A. Wood Chemicals, AGRANA Stärke GmbH, Henan Huiquan Biotechnology Co., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Adhesives for Corrugated Board market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Kilotons) and average price (US$/Ton) by manufacturer, by Chemical Raw Materials, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Adhesives for Corrugated Board Market, By Region:

United States

China

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Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Adhesives for Corrugated Board Market, Segmentation by Chemical Raw Materials:

Native Starch-Based Adhesives

Modified Starch-Based Adhesives

Synthetic Polymer-Based Adhesives

Global Adhesives for Corrugated Board Market, Segmentation by State:

Liquid Adhesives

Dry-Mix Adhesives

Global Adhesives for Corrugated Board Market, Segmentation by Function:

Standard Adhesives

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High-Speed Adhesives

Quick-Setting Adhesives

Water-Resistant Adhesives

Others

Global Adhesives for Corrugated Board Market, Segmentation by Application:

Retail Packaging

Food and Drink Packaging

Consumer Goods Packaging

Industrial Packaging

Others

Companies Profiled:

Roquette Group

Crespel & Deiters Group

Ba?ar Ticaret ve G?da Sanayi A.?. (Goma)

HarperLove

Bond Tech Industries

National Adhesives

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Greif

S.A. Wood Chemicals

AGRANA Stärke GmbH

Henan Huiquan Biotechnology Co., Ltd.

Zhejiang Fuyou Bio-Tech Co., Ltd.

Taizhou Ente New Material Co., Ltd.

Key Questions Answered

1. How big is the global Adhesives for Corrugated Board market?
2. What is the demand of the global Adhesives for Corrugated Board market?
3. What is the year over year growth of the global Adhesives for Corrugated Board market?
4. What is the total value of the global Adhesives for Corrugated Board market?
5. Who are the Major Players in the global Adhesives for Corrugated Board market?
6. What are the growth factors driving the market demand?

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