

# Global Alkyl Ketene Dimer Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Alkyl Ketene Dimer market size is expected to reach \$ 21.52 million by 2032, rising at a market growth of 2.1% CAGR during the forecast period (2026-2032).

Alkyl ketene dimer (AKD) is a class of synthetic hydrophobic chemicals derived from long-chain fatty acids of vegetable oils and supplied in the form of pale-yellow waxy solids or emulsions. It is the most important fiber-reactive neutral sizing agent and upstream wax raw material in neutral/alkaline papermaking systems. Industrially, high-carbon fatty acids from vegetable oils are first converted into fatty acid chlorides by acyl-chlorination, and these are then dimerized under appropriate catalytic and temperature conditions to produce AKD wax. The wax is further emulsified with starch, cationic emulsifiers and protective colloids under high shear to form a stable AKD emulsion, which is used in the wet-end of the paper machine or in surface sizing operations. When AKD emulsion is added to the pulp slurry or surface-sizing solution and the sheet is dried and cured, AKD migrates and orients on the fiber surface and reacts by esterification with cellulose hydroxyl groups to form a stable hydrophobic alkyl layer. This markedly reduces the absorption of water and aqueous solutions by paper and paperboard (lowering the Cobb value), enhances water resistance, moisture resistance and resistance to liquid penetration, and at the same time improves printability and dimensional stability while reducing equipment corrosion and deposits associated with acidic sizing systems. As a result, AKD supports calcium-carbonate-filled neutral/alkaline papermaking processes and enables stable, long-lasting sizing performance in cultural papers, packaging boards and various specialty papers. Alkyl ketene dimer (AKD) has evolved from a simple chemical raw material into a fundamental sizing technology in neutral/alkaline papermaking systems. Major producers (such as Kemira, Solenis, Arakawa, CHEMIPAZ and Aries) generally define AKD as a fiber-reactive neutral sizing agent: it is derived from long-chain fatty acids of vegetable oils, converted into waxy AKD through acyl-chlorination and dimerization, and

then emulsified into a cationic AKD emulsion. This emulsion is added at the wet end of the paper machine or during surface sizing and, after drying and curing, reacts with cellulose hydroxyl groups to form a stable hydrophobic alkyl layer on the fiber surface. Compared with conventional rosin-based acidic sizing, AKD can significantly reduce Cobb values and enhance the water resistance, moisture resistance and liquid-penetration resistance of paper and paperboard, while also improving printability and dimensional stability. It has thus become a key chemical underpinning calcium-carbonate-filled neutral and alkaline papermaking processes.

In terms of product and process configuration, the AKD industry has already shifted from simply 'selling wax' to system-level competition built around 'wax + emulsion + application solutions.' Chinese producers such as Tiancheng, Lansen, Tianan and Ludao, as well as Taiwan's GO YEN, all present on their websites complete product packages that combine AKD wax, high-solids emulsions, emulsifiers/stabilizers and sizing auxiliaries, emphasizing high purity, low acid value, pale-yellow flake or granular form, and excellent emulsion stability and paper-machine runnability. Kemira, Solenis and CHEMIPAZ go a step further by offering surface sizing agents, promoter resins and technical services, providing integrated solutions that cover both wet-end and surface treatment. This indicates that the focus of industry competition is shifting away from the unit price of a single chemical toward a set of composite process indicators such as 'purity and reaction efficiency,' 'emulsion stability and retention,' and 'suitability for high-speed machines and high-filler systems.'

From an industry-structure perspective, AKD is characterized by a multi-polar competitive landscape in which multinational chemical companies coexist with leading Asian local players, and China has become a critical production and export base. On the one hand, multinationals such as Kemira, Solenis, Arakawa, CHEMIPAZ and Aries possess mature product portfolios and global service networks, and they combine technological advantages with local raw materials and capacity by partnering with or investing in plants operated by firms such as Tiancheng and Wilmar in China. On the other hand, regional companies including Shandong Tiancheng, Wuxi Lansen, Shandong Tianan, Shandong Ludao and GO YEN leverage advantages in vegetable-oil resources, cost and scale to build large, export-oriented capacities in AKD wax and neutral-sizing emulsions. Driven by growing downstream demand for packaging board, food-contact paper and specialty papers, together with regulatory preferences for low-solvent, low-VOC sizing systems, the AKD industry is evolving along a trajectory of 'capacity moving eastward + product upgrading + solution-oriented competition.' This report studies the global Alkyl Ketene Dimer production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Alkyl Ketene Dimer 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 Alkyl Ketene Dimer that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Alkyl Ketene Dimer total production and demand, 2021-2032, (MT)

Global Alkyl Ketene Dimer total production value, 2021-2032, (USD Million)

Global Alkyl Ketene Dimer production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (MT), (based on production site)

Global Alkyl Ketene Dimer consumption by region & country, CAGR, 2021-2032 & (MT)

U.S. VS China: Alkyl Ketene Dimer domestic production, consumption, key domestic manufacturers and share

Global Alkyl Ketene Dimer production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (MT)

Global Alkyl Ketene Dimer production by Type, production, value, CAGR, 2021-2032, (USD Million) & (MT)

Global Alkyl Ketene Dimer production by Application, production, value, CAGR, 2021-2032, (USD Million) & (MT)

This report profiles key players in the global Alkyl Ketene Dimer 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 Shandong Tiancheng Chemical Co., Ltd., Wuxi Lansen Chemicals Co., Ltd., Shandong Tianan Chemical Co., Ltd., Wilmar International Limited, Kemira Oyj, GO YEN CHEMICAL INDUSTRIAL CO., LTD. (GYC GROUP), Solenis LLC, Arakawa Chemical Industries, Ltd., CHEMIPAZ Corporation, Akkim Kimya Sanayi ve Ticaret A.?, 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 Alkyl Ketene Dimer market

### **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (MT) and average price (USD/Kg) by manufacturer, by Type, 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 Alkyl Ketene Dimer Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Alkyl Ketene Dimer Market, Segmentation by Type:

AKD wax solid (raw material)

AKD emulsion

#### Global Alkyl Ketene Dimer Market, Segmentation by Performance:

Internal sizing grade AKD

Surface sizing AKD

Other

#### Global Alkyl Ketene Dimer Market, Segmentation by Function:

AKD-1840

AKD-1865

AKD-1895

Liquid

Global Alkyl Ketene Dimer Market, Segmentation by Application:

Copper base Paper

Copy Paper

Archival Paper

Dictionary Paper

other

**Companies Profiled:**

Shandong Tiancheng Chemical Co., Ltd.

Wuxi Lansen Chemicals Co., Ltd.

Shandong Tianan Chemical Co., Ltd.

Wilmar International Limited

Kemira Oyj

GO YEN CHEMICAL INDUSTRIAL CO., LTD. (GYC GROUP)

Solenis LLC

Arakawa Chemical Industries, Ltd.

CHEMIPAZ Corporation

Akkim Kimya Sanayi ve Ticaret A.?.

GO YEN CHEMICAL INDUSTRIAL CO., LTD.

Aries Chemical, Inc.

Shandong Ludao Chemical Co., Ltd.

**Key Questions Answered:**

1. How big is the global Alkyl Ketene Dimer market?
2. What is the demand of the global Alkyl Ketene Dimer market?
3. What is the year over year growth of the global Alkyl Ketene Dimer market?
4. What is the production and production value of the global Alkyl Ketene Dimer market?
5. Who are the key producers in the global Alkyl Ketene Dimer market?
6. What are the growth factors driving the market demand?

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