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Global ASA Internal Sizing Agents Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global ASA Internal Sizing Agents market size is expected to reach $ 427 million by 2032, rising at a market growth of 4.2% CAGR during the forecast period (2026-2032).

In 2025, global ASA Internal Sizing Agents production reached approximately 95 K Tons, with a average price of 3,250 USD/Ton.

ASA Internal Sizing Agents are reactive neutral-to-alkaline papermaking chemicals based on Alkenyl Succinic Anhydride as the core active component and specifically designed for internal wet-end sizing of paper and paperboard. In papermaking, ASA is emulsified on site into fine emulsion particles, retained on fibers, fines and fillers with the assistance of retention systems, and rapidly develops hydrophobic structures during drying. This improves water resistance, Cobb value control, ink penetration resistance, liquid holdout and converting stability. Compared with conventional acidic rosin sizing, ASA internal sizing agents are better suited to calcium carbonate-filled neutral and alkaline papermaking systems; compared with AKD, ASA offers faster sizing development and shorter curing time, making it attractive for high-speed paper machines, packaging board, printing and writing paper, food packaging paper and specialty grades requiring rapid performance build-up, stable operation and cost control. Because ASA is sensitive to hydrolysis in water, its commercial value is usually delivered as a system-type product combining high-active ASA sizing liquid, on-site emulsification and wet-end application know-how rather than as a generic chemical intermediate.

The production model of ASA internal sizing agents mainly includes two routes. The first is the manufacturing of high-active ASA sizing liquid, using long-chain alpha-olefins or internal olefins and maleic anhydride as core feedstocks. Through addition reaction,

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purification, filtration, stabilization and water-free packaging, producers obtain high-active oily ASA products for large paper mills or paper chemical formulators. The second is the formulated ASA internal sizing model, in which active ASA liquid is combined with emulsifiers, cationic starch, cationic polymers, retention and drainage aids, and application services according to paper grade, machine speed, furnish composition, filler loading and wet-end charge conditions. Leading suppliers differentiate themselves through formulation know-how, on-site emulsification systems, wet-end diagnostics and long-term technical service, while regional players often compete through active ASA liquid supply, localization and pricing advantages.

In terms of profitability, ASA internal sizing agents are a relatively high-technology, service-intensive segment within paper chemicals. Standard high-active ASA sizing liquid generally carries an estimated gross margin of around 18%?30%. Regional low-to-mid-end or price-driven products are usually in the range of 12%?22%. Premium ASA internal sizing systems with low hydrolysis, low deposit tendency, high emulsion stability, rapid sizing development and strong paper machine service capability can reach around 25%?40%, with certain customized service projects potentially higher. The upstream chain includes long-chain olefins, maleic anhydride, stabilizers, surfactants, cationic starch, cationic polymers, retention aids and emulsification equipment. The midstream covers ASA active synthesis, formulation, quality control, on-site emulsification technology and paper machine application service. The downstream mainly includes containerboard, corrugating medium, cartonboard, printing and writing paper, food packaging paper, gypsum board liner, label paper and specialty industrial paper. Future competition will shift from chemical price per ton toward sizing cost per ton of paper, machine runnability, low deposit risk, reduced hydrolysis loss and sustainable fiber-based packaging solution capability.

Growth in ASA internal sizing agents is driven by the combined forces of packaging board upgrading, wider adoption of neutral and alkaline papermaking, plastic-to-paper substitution and increasing paper machine speeds. E-commerce logistics, food delivery, cold-chain distribution, fast-moving consumer goods and industrial packaging are raising requirements for water resistance, liquid holdout, printability and converting stability. Containerboard, corrugating medium, cartonboard and food packaging paper are becoming the core demand areas for ASA. At the same time, recyclable packaging, plastic reduction policies and brand owners? low-carbon supply chain targets are pushing fiber-based materials toward higher barrier performance, lighter weight and more stable production. With rapid sizing development, short curing time and good compatibility with calcium carbonate-filled neutral and alkaline systems, ASA helps paper mills improve Cobb value control, reduce curing-related inventory time, increase

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grade-change flexibility and optimize chemical cost per ton of paper. For CEOs, marketing managers and investors, ASA internal sizing agents are not merely functional paper additives; they are a key link connecting green packaging upgrades, paper machine efficiency improvement and the growth of high-performance fiber-based materials. Producers with stable active ASA supply, low-hydrolysis formulations, on-site emulsification control and machine service capabilities are better positioned to gain share in large paper mill procurement, regional substitution and premium packaging paper upgrades.

The main risks of ASA internal sizing agents arise from their high reactivity and the complexity of papermaking wet-end systems. ASA is prone to hydrolysis in water, and if emulsion particle size, pH, conductivity, anionic trash, white water circulation, dosing position or retention system is not properly controlled, sizing efficiency may decline, Cobb values may fluctuate, deposits may increase, foam may rise, paper defects may occur and machine cleaning burdens may grow. On the feedstock side, price fluctuations in long-chain olefins, maleic anhydride, surfactants and cationic polymers can compress supplier profitability. On the demand side, paper mills often intensify cost-reduction efforts during weak industry cycles, increasing bargaining pressure on chemical suppliers. On the competitive side, AKD, rosin sizes, surface sizing agents, modified starch systems and new fluorine-free barrier coatings may create substitution or collaborative competition across different paper grades. From a regulatory perspective, food contact safety, recyclability, low VOC, low deposit tendency and environmental compliance are becoming important procurement thresholds. Companies lacking self-owned production capability, formulation know-how and field service teams will find it difficult to enter stable supply systems of large paper mills, and industry competition is expected to concentrate further around technology-driven, system-based and service-oriented producers.

Downstream demand will continue to shift from traditional printing and writing paper toward packaging board, recycled fiber grades and high-performance fiber-based functional materials. Containerboard and corrugating medium will remain the largest demand base for ASA internal sizing agents, with performance requirements moving from simple water resistance to lightweighting, high strength, low water absorption and stable operation on high-speed paper machines. Cartonboard, food packaging paper and liquid-contact packaging will increasingly promote the combined use of ASA with surface sizing, coating, wet-strength additives and barrier materials. Although printing and writing paper is affected by digitalization, premium office paper, publishing paper and education-related paper grades still maintain stable internal sizing demand. As recycled fiber usage rises, anionic trash, stickies, filler fluctuations and closed white

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water circulation make sizing control more complex, creating greater value for high-stability ASA formulations. Future demand growth will be reflected not only in volume expansion but also in product upgrading. ASA internal sizing agents with low hydrolysis, low deposit tendency, high retention, food-packaging suitability, high-speed machine compatibility and recyclability support will be increasingly favored. Producers capable of integrating active ASA liquid, emulsifiers, digital dosing, paper machine data and on-site service will evolve from chemical suppliers into long-term partners for paper mill efficiency and green packaging transformation.

This report studies the global ASA Internal Sizing Agents production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for ASA Internal Sizing Agents 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 ASA Internal Sizing Agents that contribute to its increasing demand across many markets.

Highlights and key features of the study
Global ASA Internal Sizing Agents total production and demand, 2021-2032, (Tons)
Global ASA Internal Sizing Agents total production value, 2021-2032, (USD Million)
Global ASA Internal Sizing Agents production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)
Global ASA Internal Sizing Agents consumption by region & country, CAGR, 2021-2032 & (Tons)
U.S. VS China: ASA Internal Sizing Agents domestic production, consumption, key domestic manufacturers and share
Global ASA Internal Sizing Agents production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)
Global ASA Internal Sizing Agents production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)
Global ASA Internal Sizing Agents production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global ASA Internal Sizing Agents 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 Kemira, Solenis, Aurorium, Mare, Dixie Chemical, Buckman, CHEMIPAZ, AXCHEM Group, Aries Chemical, IVAX Paper

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Chemicals, 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 ASA Internal Sizing Agents market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Tons) and average price (US$/Ton) 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 ASA Internal Sizing Agents Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global ASA Internal Sizing Agents Market, Segmentation by Type:

C16

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C18

C16 and C18 Mixtures

Others

Global ASA Internal Sizing Agents Market, Segmentation by Source:

Fossil-based Olefins Sizing Agents

Biobased ASA Sizing Agents

Global ASA Internal Sizing Agents Market, Segmentation by Application:

Packaging Paper

Printing Paper

Others

Companies Profiled:

Kemira

Solenis

Aurorium

Mare

Dixie Chemical

Buckman

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AXCHEM Group

Aries Chemical

IVAX Paper Chemicals

Anmol Polymers

Guangdong Huajinda New Material

Shandong Guorun New Material

Jiangsu Feymer Technology

Hubei Jiayun Chemical

Jinhao New Material

China Soft Technology

Key Questions Answered:
1. How big is the global ASA Internal Sizing Agents market?
2. What is the demand of the global ASA Internal Sizing Agents market?
3. What is the year over year growth of the global ASA Internal Sizing Agents market?
4. What is the production and production value of the global ASA Internal Sizing Agents market?
5. Who are the key producers in the global ASA Internal Sizing Agents market?
6. What are the growth factors driving the market demand?

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