

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

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Abstracts

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

ASA Paper Sizing Agents, or Alkenyl Succinic Anhydride paper sizing agents, are reactive neutral-to-alkaline internal sizing chemicals specifically used in the wet end of papermaking. They should not be treated as generic ASA chemical intermediates; instead, they are paper-performance additives that are emulsified on site or formulated into dedicated sizing products, retained on fibers and fillers, and developed during drying to improve water resistance, Cobb value control, ink penetration resistance and liquid holdout of paper and paperboard. ASA paper sizing agents are mainly used in containerboard, corrugating medium, cartonboard, printing and writing paper, food packaging paper, gypsum board liner and specialty paper grades, especially in neutral or alkaline papermaking systems and high-speed paper machines. Because ASA is sensitive to hydrolysis, its market value lies not only in active chemical content but also in sizing efficiency, emulsion stability, wet-end retention, deposit control and paper machine runnability.

ASA Paper Sizing Agents, namely Alkenyl Succinic Anhydride paper sizing agents, are reactive internal sizing chemicals mainly used in neutral-to-alkaline papermaking systems. The active component, alkenyl succinic anhydride, contains both hydrophobic alkenyl chains and highly reactive anhydride groups, and is typically applied as a high-active liquid, an on-site emulsified size, or an integrated ASA sizing program in the wet end of paper machines. With the assistance of cationic starch, synthetic polymers,

emulsifiers and retention aids, ASA forms fine emulsion particles in the furnish and develops water resistance during the drying process, improving liquid holdout, ink penetration resistance, Cobb value control and overall barrier performance of paper and paperboard. Compared with conventional acidic rosin sizing, ASA is 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 highly attractive for high-speed paper machines, packaging grades, printing and writing paper, and specialty papers requiring rapid performance build-up and cost-efficient wet-end operation. Because ASA is susceptible to hydrolysis in water, its performance depends strongly on emulsion quality, wet-end charge balance, dosing position, retention efficiency and machine cleanliness. Therefore, ASA paper sizing is best understood not merely as a chemical product, but as an integrated wet-end performance solution combining chemistry, emulsification equipment and technical service.

The production model of ASA paper sizing agents can be divided into two major types. The first is the active ASA liquid manufacturing model, where long-chain alpha-olefins and maleic anhydride are used as key feedstocks and converted through addition reaction, purification, stabilization and quality control into high-active ASA liquid products. This model mainly serves large paper mills, paper chemical formulators and global chemical companies. The second is the ASA sizing system model, in which active ASA liquid is combined with emulsifiers, cationic starch or polymers, retention aids, on-site emulsification units, dosing systems and technical services to deliver an operational wet-end sizing program. Global leading suppliers tend to emphasize the second model, creating added value through formulation know-how, machine optimization, technical service and long-term customer relationships, while Chinese and other Asian suppliers are increasingly entering the market through active ASA liquid, emulsifier packages and localized substitution.

In terms of profitability, ASA paper sizing agents are positioned as a medium-to-high technical barrier product within the paper chemicals industry, but margins are influenced by feedstock costs, paper mill bargaining power and regional competition. High-active ASA liquids generally generate estimated gross margins of around 18%–30%, with integrated and large-scale producers positioned at the higher end. Standard compounded or regional low-to-mid-end products usually achieve around 12%–22%. Integrated ASA sizing programs that include on-site emulsification, formulation optimization, machine service and long-term supply contracts can reach around 25%–40% or even higher. The upstream chain includes alpha-olefins, maleic anhydride, surfactants, cationic starch, polyacrylamide-based retention aids and emulsification equipment. The midstream covers ASA synthesis, emulsifier development, formulation

and technical application service. The downstream mainly consists of containerboard, corrugating medium, cartonboard, printing and writing paper, packaging paper, food packaging paper, gypsum board liner and specialty paper. As paper machines become faster, recycled fiber usage increases, filler systems become more complex and green packaging standards rise, competition among ASA suppliers is shifting from price per ton to total sizing efficiency, machine runnability, cost per ton of paper, deposit control and sustainable performance solutions.

Market Development Opportunities & Main Driving Factors

The ASA paper sizing agents market is entering a growth phase driven by paper-based packaging upgrades, wider adoption of neutral and alkaline papermaking, and increasingly sophisticated wet-end chemistry management. The expansion of e-commerce, cold-chain logistics, food delivery, fast-moving consumer goods and industrial packaging is raising performance requirements for containerboard, corrugating medium, cartonboard and functional packaging papers, especially in water resistance, liquid penetration control, printability and converting stability. With rapid sizing development, short curing time, good compatibility with high-speed paper machines and suitability for calcium carbonate-filled systems, ASA is becoming a key sizing option for packaging board and efficiency-focused paper machines. At the same time, global trends toward plastic reduction, recyclable packaging and low-carbon supply chains are encouraging brand owners to adopt more fiber-based materials, which further increases demand for liquid holdout, surface quality and moisture resistance. For paper producers, ASA helps improve Cobb value control, reduce curing-related inventory time, increase grade-change flexibility and optimize chemical cost per ton of paper. Suppliers with stable ASA liquid supply, on-site emulsification systems, formulation databases and machine application service capabilities are expected to gain stronger competitive advantages in large paper mill procurement and regional green packaging upgrades.

Market Challenges, Risks & Restraints

The main challenge for ASA paper sizing agents lies in the hydrolysis risk and wet-end stability management caused by their high reactivity. ASA emulsions generally need to be prepared on site and used promptly; if particle size, pH, charge environment, shear conditions, retention system or dosing position is not properly controlled, sizing efficiency may decline and issues such as deposits, foam, paper defects and increased machine cleaning burden may occur. On the feedstock side, price fluctuations in alpha-olefins, maleic anhydride and surfactants can directly affect ASA liquid costs, while

paper mills tend to intensify chemical cost reduction during weak industry cycles, putting pressure on supplier margins. On the competitive side, AKD, surface sizing agents, modified starch systems and emerging bio-based or fluorine-free barrier materials may create substitution pressure in certain paper grades. In terms of regulation and customer requirements, food contact safety, recyclability, low VOC, low deposit tendency and environmental compliance are becoming important procurement thresholds, forcing suppliers to improve product purity, residual control and application safety. For small and medium-sized suppliers without strong on-site service capabilities, entering large paper mills through low-priced ASA liquid alone will become increasingly difficult, and industry competition is expected to concentrate further around technology-driven, system-based and service-oriented players.

Downstream Demand Trends

From a downstream perspective, demand for ASA paper sizing agents will continue to shift toward packaging board, recycled fiber grades and high-performance fiber-based materials. Containerboard and corrugating medium will remain the core demand base, as e-commerce logistics and industrial packaging require board to maintain strength, moisture resistance and print stability at lower basis weights. Cartonboard, food packaging paper and liquid-contact packaging will increasingly promote the combined use of ASA with surface sizing, coating, barrier layers and wet-strength systems. Although printing and writing paper faces long-term pressure from digitalization, stable sizing demand remains in premium office paper, publishing, printing and education-related grades. In recycled paper systems, anionic trash, stickies and filler fluctuations from recovered fiber make sizing control more complex, creating opportunities for ASA system suppliers with formulation optimization and wet-end diagnostic capabilities. Future market growth will be reflected not only in volume expansion but also in product upgrading. ASA solutions with high active content, low hydrolysis tendency, low deposit risk, high-speed machine suitability, food-packaging compatibility and recyclability support will be increasingly favored. Companies that integrate ASA liquid, emulsifiers, digital dosing, paper machine data and on-site service will be better positioned to evolve from chemical suppliers into operational efficiency partners for paper mills.

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

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

Highlights and key features of the study

Global ASA Paper Sizing Agents total production and demand, 2021-2032, (Tons)

Global ASA Paper Sizing Agents total production value, 2021-2032, (USD Million)

Global ASA Paper Sizing Agents production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global ASA Paper Sizing Agents consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: ASA Paper Sizing Agents domestic production, consumption, key domestic manufacturers and share

Global ASA Paper Sizing Agents production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global ASA Paper Sizing Agents production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global ASA Paper Sizing Agents production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global ASA Paper 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 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 Paper 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 Paper Sizing Agents Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global ASA Paper Sizing Agents Market, Segmentation by Type:

C16

C18

C16 and C18 Mixtures

Others

Global ASA Paper Sizing Agents Market, Segmentation by Source:

Fossil-based Olefins Sizing Agents

Biobased ASA Sizing Agents

Global ASA Paper Sizing Agents Market, Segmentation by Application:

Packaging Paper

Printing Paper

Others

Companies Profiled:

Kemira

Solenis

Aurorium

Mare

Dixie Chemical

Buckman

CHEMIPAZ

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 Paper Sizing Agents market?
2. What is the demand of the global ASA Paper Sizing Agents market?
3. What is the year over year growth of the global ASA Paper Sizing Agents market?
4. What is the production and production value of the global ASA Paper Sizing Agents market?
5. Who are the key producers in the global ASA Paper Sizing Agents market?
6. What are the growth factors driving the market demand?

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