

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

<https://marketpublishers.com/r/G6BEDB79455EEN.html>

Date: June 2026

Pages: 171

Price: US\$ 4,480.00 (Single User License)

ID: G6BEDB79455EEN

Abstracts

The global Pulp and Paper Sizing Agents market size is expected to reach \$ 2460 million by 2032, rising at a market growth of 4.6% CAGR during the forecast period (2026-2032).

Pulp and paper sizing agents are chemicals used in the papermaking process to improve the paper's resistance to liquid penetration, control ink absorption, and enhance printability. These agents are applied to the paper fibers during the paper manufacturing process to modify the surface properties of the paper, making it more resistant to water, ink, and other liquids. Common sizing agents include rosin, alum, alkyl ketene dimer (AKD), and alkyl succinic anhydride (ASA). The sizing process is crucial for achieving desired characteristics in paper products, such as improved strength, reduced dusting, and enhanced print quality, ultimately influencing the final performance and appearance of the paper. The price of this product is approximately \$712 per ton.

From an industry chain perspective, pulp and paper sizing agents sit in a chemical-intensive upstream supply system and a highly diversified downstream application landscape. Upstream, production relies on petrochemical derivatives and natural rosin-based materials, including fatty acids, resin acids, waxes, starch derivatives, and specialty chemicals such as alkenyl succinic anhydride and alkyl ketene dimer, with key inputs sourced from crude oil refining, forestry by-products, and chemical intermediates suppliers. The manufacturing process is technology-driven, involving emulsification, stabilization, and formulation capabilities, often controlled by specialty chemical companies. Downstream, sizing agents are primarily consumed by paper mills across packaging paper, printing and writing paper, tissue, and specialty paper segments, where they are critical for controlling liquid penetration and surface properties. Demand

is closely tied to trends in packaging, e-commerce, sustainability requirements, and the shift toward recycled fibers, with increasing emphasis on environmentally friendly and neutral or alkaline sizing systems.

From a market perspective, pulp and paper sizing agents represent a specialized but steadily expanding segment within the broader paper chemicals industry, characterized by moderate growth and increasing technological differentiation. Demand is structurally supported by the resilience of the pulp and paper sector, particularly packaging, tissue, and specialty grades, where sizing agents remain essential for performance enhancement, even as traditional printing paper declines. At the same time, the market is undergoing a clear transition toward environmentally compliant and high-performance formulations, driven by tightening regulations on chemical emissions and the shift toward recycled fiber systems, which require more advanced sizing solutions to maintain quality. Innovation is increasingly focused on bio-based, biodegradable, and fluorine-free products, alongside process optimization and digital integration at paper mills, reinforcing supplier differentiation beyond price competition. Regionally, Asia-Pacific remains the dominant and fastest-growing market due to its large-scale paper production and packaging demand, while mature markets emphasize sustainability upgrades and efficiency improvements. Overall, the industry exhibits characteristics of a functional chemicals market with stable demand, incremental innovation, and strong linkage to packaging-driven structural growth, positioning sizing agents as a critical enabler of next-generation paper materials.

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

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

Highlights and key features of the study

Global Pulp and Paper Sizing Agents total production and demand, 2021-2032, (Tons)
Global Pulp and Paper Sizing Agents total production value, 2021-2032, (USD Million)
Global Pulp and Paper Sizing Agents production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)
Global Pulp and Paper Sizing Agents consumption by region & country, CAGR, 2021-2032 & (Tons)

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

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

Global Pulp and Paper Sizing Agents production by Raw Materials, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

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

This report profiles key players in the global Pulp and 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 Cargill, Kemira, Solenis, Primient, Chengming Chemical, Kurita, Ingredion, Arakawa Chemical, CHEMIPAZ, Harima 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 Pulp and 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 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 Pulp and Paper Sizing Agents Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Pulp and Paper Sizing Agents Market, Segmentation by Raw Materials:

Starch-Based Sizing Agents

Styrene-Acrylic (SA) Copolymers

Modified Alkyl Ketene Dimer (AKD)

Others

Global Pulp and Paper Sizing Agents Market, Segmentation by Type:

Natural Sizing Agents

Synthetic Sizing Agents

Global Pulp and Paper Sizing Agents Market, Segmentation by Mechanism of Action:

Paper Surface

Pulp Interior

Global Pulp and Paper Sizing Agents Market, Segmentation by Application:

Paper

Cardboard

Pulp

Companies Profiled:

Cargill

Kemira

Solenis

Primient

Chengming Chemical

Kurita

Ingredion

Arakawa Chemical

CHEMIPAZ

Harima Chemicals

Transfar Whyyon

Chemigate

Hangzhou Papermate

Shandong Tiancheng Chemical

Galam

Archroma

Mare

AGRANA

Guangzhou Aodong

Jinhao New Material

Henan Jingxin Fabric

Key Questions Answered:

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

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