

# Global Solventless Adhesives for Flexible Packaging Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G6EB3CC42B1FEN.html>

Date: May 2026

Pages: 175

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

ID: G6EB3CC42B1FEN

## Abstracts

The global Solventless Adhesives for Flexible Packaging market size is expected to reach \$ 339 million by 2032, rising at a market growth of 4.0% CAGR during the forecast period (2026-2032).

Solventless Adhesives for Flexible Packaging are reactive laminating adhesive systems used to bond two or more flexible substrates, such as plastic films, metallized films, paper, or aluminum foil, into multilayer packaging structures without using solvent carriers. In current industrial practice, these products are most commonly 100% solids, two-component polyurethane systems composed mainly of an isocyanate component and a polyol component, which react after application to form the final adhesive layer. They are widely used because they eliminate solvent evaporation during lamination, support high-speed converting, and are suitable for many food and non-food flexible packaging structures.

In 2025, global Solventless Adhesives for Flexible Packaging production reached approximately 71,143 tons, with an average global market price of around US\$ 3,500 per ton.

The supply chain for Solventless Adhesives for Flexible Packaging features upstream raw material suppliers providing key components including isocyanates (MDI, TDI), polyols (polyester, polyether), and performance additives (catalysts, stabilizers, adhesion promoters), whose pricing volatility directly impacts adhesive costs; adhesive manufacturers then formulate, blend, and package these materials into ready-to-use products, investing in R&D for improved performance (low migration, recyclability) and regulatory compliance; downstream partners include flexible packaging converters who apply adhesives to substrates using specialized equipment to create multi-layer

laminates, which are then supplied to brand owners in food, beverage, pharmaceutical, and industrial sectors for final product packaging. This value chain is characterized by close collaboration between manufacturers and converters to optimize process efficiency, while brand owners increasingly drive demand for sustainable, low-migration solutions that meet consumer expectations and global packaging regulations.

The cost structure of Solventless Adhesives for Flexible Packaging is dominated by raw materials (65-75% of total cost), with isocyanates (MDI/TDI) and polyols accounting for the largest share, followed by performance additives and packaging materials. Manufacturing costs (10-15%) include energy for mixing, quality control testing, and specialized equipment maintenance, while R&D expenses (5-8%) focus on developing low-migration formulations, recyclable systems, and process optimization technologies. Additional costs encompass logistics (3-5%) for transporting high-viscosity materials, regulatory compliance (2-4%) for food contact safety certifications, and sales/marketing (3-5%) to promote sustainability benefits and technical support services.

This report studies the global Solventless Adhesives for Flexible Packaging production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Solventless Adhesives for Flexible Packaging 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 Solventless Adhesives for Flexible Packaging that contribute to its increasing demand across many markets.

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

Global Solventless Adhesives for Flexible Packaging total production and demand, 2021-2032, (Tons)

Global Solventless Adhesives for Flexible Packaging total production value, 2021-2032, (USD Million)

Global Solventless Adhesives for Flexible Packaging production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Solventless Adhesives for Flexible Packaging consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Solventless Adhesives for Flexible Packaging domestic production, consumption, key domestic manufacturers and share

Global Solventless Adhesives for Flexible Packaging production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Solventless Adhesives for Flexible Packaging production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Solventless Adhesives for Flexible Packaging production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Solventless Adhesives for Flexible Packaging 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 Dow, Henkel, Covestro, Bostik, Sun Chemical, HB Fuller, MORCHEM, Bond Tech Industries, DIC Corporation, Songwon, 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 Solventless Adhesives for Flexible Packaging 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 Solventless Adhesives for Flexible Packaging Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

### Global Solventless Adhesives for Flexible Packaging Market, Segmentation by Type:

One-Component Solventless Adhesives

Two-Component Solventless Adhesives

### Global Solventless Adhesives for Flexible Packaging Market, Segmentation by Chemical System:

Polyurethane Solventless Adhesives

Bio-Based Solventless Adhesives

Other

### Global Solventless Adhesives for Flexible Packaging Market, Segmentation by Solids Content:

100% Solids Solventless Adhesives

Carrier-Free Reactive Adhesives

Others

### Global Solventless Adhesives for Flexible Packaging Market, Segmentation by Application:

Food

Pet Food

Medicine

Industrial

Other

Companies Profiled:

Dow

Henkel

Covestro

Bostik

Sun Chemical

HB Fuller

MORCHEM

Bond Tech Industries

DIC Corporation

Songwon

Cytech Group

Shanghai Huitian New Material Co., Ltd

Chemique

Coim Group

IVP

Ashland

Worthen Industries

Nanpao Resins Chemical Group

Kangda New Materials

Megabond (Huangshan) Adhesive Co.,Ltd

Beijing Comens New Materials Co., Ltd.

ALTANA(ACTEGA)

Sapici

**Key Questions Answered:**

1. How big is the global Solventless Adhesives for Flexible Packaging market?
2. What is the demand of the global Solventless Adhesives for Flexible Packaging market?
3. What is the year over year growth of the global Solventless Adhesives for Flexible Packaging market?
4. What is the production and production value of the global Solventless Adhesives for Flexible Packaging market?
5. Who are the key producers in the global Solventless Adhesives for Flexible Packaging market?
6. What are the growth factors driving the market demand?

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