

Global Tobacco Adhesive Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Tobacco Adhesive market size is expected to reach \$ 143 million by 2032, rising at a market growth of 0.0% CAGR during the forecast period (2026-2032).

Tobacco adhesive refers to the specialized bonding materials used in cigarette, cigarillo, heated-tobacco consumable and tobacco-packaging production. Key type includes side-seam adhesive for cigarette paper closure, tipping adhesive for bonding filter and tobacco rod through tipping paper, packaging adhesive for hinge-lid boxes, soft packs and cartons, and filter-rod forming adhesive for plug-wrap and filter-material assembly.

The market demand is estimated at about 57,720 mt in 2025, with an average global market price of about 2,385 USD/mt. Polymer emulsions are the dominant product type, accounting for 66.81%, because VAE/PVA/acrylic-type water-based systems match paper, paperboard, plug-wrap and conventional filter substrates well, while supporting clean application, stable viscosity and high-speed running. Hot-melt adhesives are used where fast setting, low application temperature, precise bead control and rapid packaging or filter assembly are required. Key suppliers include Henkel, H.B. Fuller, Beijing Changrun Chemical, Changsha Loyal Chemical, T?rmerleim, Jiangsu Guanghui Adhesive Technology, ICAT Srl, Guiyang Yinyi New Materials, Huawei Bonding Materials (Shanghai) and Siag Chemicals.

The upstream chain is relatively concentrated around polymer emulsions, EVA/hot-melt resins, tackifiers, waxes, plasticizers, PVOH, starch/dextrin derivatives, preservatives, defoamers, wetting agents, packaging drums/IBCs and local blending capacity. Because water-based tobacco adhesives contain a high water share and are sensitive to freezing, microbial stability and viscosity drift, the supply model is usually regional: international suppliers serve multinational tobacco groups through global or regional

frameworks, while domestic suppliers serve national tobacco groups and local cigarette factories through qualification, tendering and plant-level validation. Downstream users include China National Tobacco, Philip Morris International, British American Tobacco, Japan Tobacco/JTI, Imperial Brands, Altria, KT&G, ITC, Gudang Garam and Djarum, as well as filter-rod makers and packaging converters attached to those cigarette supply chains. Procurement is not spot-price driven. Buyers normally require machine trials, odor and migration checks, batch consistency, SDS/regulatory documentation, compatibility with paper and tipping materials, clean nozzle behavior, low stringing, stable open time, and supplier ability to respond rapidly to line stoppages. Contracts are commonly annual or multi-year, with approved-supplier lists and factory-by-factory technical service.

Regionally, China is the largest global tobacco-adhesive market, accounting for 38.62% of demand, far ahead of North America at 4.90% and Europe at 19.93%. This reflects China's very large cigarette manufacturing base, integrated tobacco-material procurement system and dense domestic supplier base. Europe remains important because of multinational tobacco R&D, premium packaging, regulatory discipline and established suppliers such as Henkel, T?rmerleim, ICAT and other specialist adhesive formulators, while North America is smaller in volume but still technically demanding due to large branded manufacturers and strict quality systems. Future incremental demand is expected to come mainly from Asia-Pacific outside China, Southeast Asia, the Middle East and Latin America, where cigarette production remains material and local sourcing is rising to reduce logistics cost, lead time and cold-chain risk for water-based glue. By application, tipping adhesive is the largest segment, with a 54.04% share, because every filter cigarette requires reliable bonding between the filter section, tipping paper and tobacco rod under high-speed conditions. Side-seam, packaging and filter-rod forming adhesives are complementary but essential. The technical direction is toward higher machine speed, lower odor, lower VOC and monomer residue, lower application temperature, cleaner nozzles, reduced glue consumption, better precision for slim and capsule products, and compatibility with new filter substrates, heated-tobacco consumables and recyclable or lower-migration packaging structures.

This report studies the global Tobacco Adhesive production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Tobacco Adhesive 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 Tobacco Adhesive that contribute to

its increasing demand across many markets.

Highlights and key features of the study

Global Tobacco Adhesive total production and demand, 2021-2032, (K MT)

Global Tobacco Adhesive total production value, 2021-2032, (USD Million)

Global Tobacco Adhesive production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K MT), (based on production site)

Global Tobacco Adhesive consumption by region & country, CAGR, 2021-2032 & (K MT)

U.S. VS China: Tobacco Adhesive domestic production, consumption, key domestic manufacturers and share

Global Tobacco Adhesive production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K MT)

Global Tobacco Adhesive production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

Global Tobacco Adhesive production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

This report profiles key players in the global Tobacco Adhesive 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 Henkel, H.B. Fuller, T?rmerleim, ICAT Srl, Techbond, Siag Chemicals, Organik Kimya, Intercol, Beijing ChangRun Chemicals, Changsha Loyal Chemical Technology, 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 Tobacco Adhesive market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K MT) and average price (USD/MT) 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 Tobacco Adhesive Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Tobacco Adhesive Market, Segmentation by Type:

Polymer Emulsions

Hot Melt Adhesives

Others

Global Tobacco Adhesive Market, Segmentation by Tobacco Type:

Cigarette

Cigar

Heated Tobacco

Others

Global Tobacco Adhesive Market, Segmentation by Chemical:

Synthetic Adhesives

Natural Adhesives

Global Tobacco Adhesive Market, Segmentation by Application:

Filter Tipping Adhesives

Side Seam Adhesives

Packaging Adhesives

Filter Rod Forming Adhesives

Others

Companies Profiled:

Henkel

H.B. Fuller

T?rmerleim

ICAT Srl

Techbond

Siag Chemicals

Organik Kimya

Intercol

Beijing ChangRun Chemicals

Changsha Loyal Chemical Technology

Jiangsu Guanghui Adhesive Technology

Huawi Adhesive Materials (Shanghai)

Hunan Everest Technology

Guiyang Yinyi New Materials

Key Questions Answered:

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

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