

Global Two-Component Solvent-free Polyurethane Adhesives Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Two-Component Solvent-free Polyurethane Adhesives market size is expected to reach \$ 460 million by 2032, rising at a market growth of 6.9% CAGR during the forecast period (2026-2032).

In 2025, global Two-Component Solvent-free Polyurethane Adhesives production reached approximately 49k tons, with an average global market price of around US\$5.7k per ton.

Two-Component Solvent-free Polyurethane Adhesives are reactive polyurethane adhesive systems composed of Part A and Part B, with little or no organic solvent. Part A is typically based on polyester polyols, polyether polyols, or modified polyurethane resins, while Part B is usually an isocyanate curing agent. After being accurately metered and mixed by dedicated equipment, the two components crosslink and cure to form an adhesive layer with strong bonding strength, flexibility, heat resistance, chemical resistance, and lamination reliability. These adhesives are mainly used in flexible food packaging, pharmaceutical packaging, aluminum-plastic laminates, plastic-plastic laminates, industrial laminates, composite panels, automotive interiors, and new-energy-related material bonding. Compared with solventborne polyurethane adhesives, solvent-free systems reduce solvent evaporation and recovery requirements, lower VOC emissions, improve coating efficiency, and provide higher solids content, making them an important environmental upgrade route in packaging and industrial lamination. However, they require higher precision in metering, mixing, coating, substrate wetting, pot-life control, initial bonding, and curing management.

The upstream supply chain of two-component solvent-free polyurethane adhesives

includes polyester polyols, polyether polyols, isocyanates such as MDI, TDI, HDI, and IPDI, catalysts, chain extenders, coupling agents, antioxidants, tackifying resins, leveling agents, and solvent-free laminating equipment. Representative suppliers include BASF, Covestro, Huntsman, Wanhua Chemical, Dow, Evonik, Mitsubishi Chemical, Eastman, Nordson, and Bobst. Midstream manufacturers and formulators include Henkel, H.B. Fuller, Bostik, Dow, Comens Material, Huitian New Materials. Downstream applications include food packaging, pharmaceutical packaging, personal-care packaging, aluminum-plastic laminates, plastic-plastic laminates, industrial laminates, composite panels, and automotive interiors. Representative users include Amcor, Berry Global, Sealed Air, Tetra Pak, Aptar, Nike, Adidas, Toyota, Volkswagen, BYD, Apple, and Samsung Electronics.

The two-component solvent-free polyurethane adhesive market is currently in a phase of rapid substitution and application expansion, with flexible packaging, food packaging, pharmaceutical packaging, and aluminum-plastic laminates as the main demand sources. Key trends include low VOC emissions, low migration, high-speed lamination, faster curing, retort resistance, high-barrier lamination, and improved food-contact safety. Growth drivers include stricter environmental regulations, cost and efficiency improvement in packaging production, rising solvent recovery costs, lightweight packaging trends, and higher food and pharmaceutical packaging safety requirements. Main challenges include higher equipment investment, strict metering and mixing accuracy requirements, difficulty in initial bonding and curing control, the need to improve compatibility with some complex substrates, and intensifying competition in low-end products. Overall, two-component solvent-free PU adhesives are an important replacement route for traditional solventborne laminating adhesives, with future growth mainly driven by premium flexible packaging, pharmaceutical packaging, retort packaging, and high-barrier laminates.

This report studies the global Two-Component Solvent-free Polyurethane Adhesives production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Two-Component Solvent-free Polyurethane Adhesives 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 Two-Component Solvent-free Polyurethane Adhesives that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Two-Component Solvent-free Polyurethane Adhesives total production and demand, 2021-2032, (Kilotons)

Global Two-Component Solvent-free Polyurethane Adhesives total production value, 2021-2032, (USD Million)

Global Two-Component Solvent-free Polyurethane Adhesives production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Two-Component Solvent-free Polyurethane Adhesives consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Two-Component Solvent-free Polyurethane Adhesives domestic production, consumption, key domestic manufacturers and share

Global Two-Component Solvent-free Polyurethane Adhesives production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Two-Component Solvent-free Polyurethane Adhesives production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Two-Component Solvent-free Polyurethane Adhesives production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Two-Component Solvent-free Polyurethane Adhesives 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 Graco Inc, 3M, Henkel, Sika, Dow, Bostik, Wacker, Mapei, H.B. Fuller, Huntsman, 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 Two-Component Solvent-free Polyurethane Adhesives market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kilotons) 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 Two-Component Solvent-free Polyurethane Adhesives Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Two-Component Solvent-free Polyurethane Adhesives Market, Segmentation by Type:

Thermoplastic Type

Thermosetting Type

Global Two-Component Solvent-free Polyurethane Adhesives Market, Segmentation by Main Agent System:

Polyester Type

Polyether Type

Polyester-Polyether Composite Type

Others

Global Two-Component Solvent-free Polyurethane Adhesives Market, Segmentation by Viscosity:

500-1000 mPa?s

1000-4000 mPa?s

4000-8000 mPa?s

Others

Global Two-Component Solvent-free Polyurethane Adhesives Market, Segmentation by Application:

Automobile

Architecture

Aerospace

Other

Companies Profiled:

Graco Inc

3M

Henkel

Sika

Dow

Bostik

Wacker

Mapei

H.B. Fuller

Huntsman

Arkema

Ashland

Permabond

Kleiberit

Hoenle

Scott Bader

Scigrip

L&L Products

Parson Adhesives

Hernon Manufacturing

RiedBV

Jiadi New Materials

Comens New Materials

Jointas Chemical

Huitian New Materials

Colltech

Baiyun Technology

Hinnel New Material

Key Questions Answered:

1. How big is the global Two-Component Solvent-free Polyurethane Adhesives market?
2. What is the demand of the global Two-Component Solvent-free Polyurethane Adhesives market?
3. What is the year over year growth of the global Two-Component Solvent-free Polyurethane Adhesives market?
4. What is the production and production value of the global Two-Component Solvent-free Polyurethane Adhesives market?
5. Who are the key producers in the global Two-Component Solvent-free Polyurethane Adhesives market?
6. What are the growth factors driving the market demand?

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