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Global Water-Based Laminating Adhesives for Flexible Packaging Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Water-Based Laminating Adhesives for Flexible Packaging market size was valued at US$ 1152 million in 2025 and is forecast to a readjusted size of US$ 1704 million by 2032 with a CAGR of 5.7% during review period.

Water-Based Laminating Adhesives for Flexible Packaging are liquid adhesive systems in which water serves as the principal dispersion medium and the formulated product provides interlayer bonding in multilayer flexible packaging structures. The market primarily covers acrylic emulsions, waterborne polyurethane dispersions, acrylic polyurethane dispersion hybrids and other commercially established aqueous polymer systems supplied as one-component or two-component products. These adhesives are applied through dry-bond or wet-bond lamination processes to join polymer films, paper, aluminum foil and metallized films used in food, beverage, pharmaceutical, personal care, household product and other flexible packaging. Product performance is evaluated through bond strength, initial tack, drying efficiency, solids content, heat resistance, moisture resistance, chemical resistance, food-contact suitability and compatibility with recycling or composting structures. Market volume is measured in Tons based on the delivered liquid product, with the main component and required crosslinker counted together for two-component systems. The study focuses on commercially supplied water-based adhesives that assume the formulation, quality and bonding-performance responsibility for flexible packaging lamination.

Key Findings

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Global sales volume reached approximately 390,000 Tons in 2025

Global sales volume is estimated at approximately 409,000 Tons in 2026

Average selling price increased from approximately US$2,870 per Ton in 2025 to US$2,910 per Ton in 2026

Asia-Pacific is the largest production and consumption region

Acrylic water-based laminating adhesives remain the largest product family

Market Trends

The development of Water-Based Laminating Adhesives for Flexible Packaging is shifting from basic low-emission bonding toward higher solids, faster drying, stronger initial bond strength and compatibility with recyclable packaging structures. Traditional products were concentrated in paper-to-film, paper-to-foil and general-purpose light-duty laminates, while newer acrylic, polyurethane and hybrid systems are addressing film-to-film structures, metallized films and more demanding food-contact applications. Higher-solids formulations are reducing the amount of water that must be removed in the drying oven, allowing converters to increase line speed and narrow the productivity gap with solvent-based and solvent-free systems. Product development is also becoming structure-specific: adhesive suppliers increasingly optimize formulations for mono-material PE or PP packaging, fiber-based laminates, compostable films and structures designed for delamination during recycling. Qualification is moving beyond initial peel strength toward migration control, chemical resistance, rapid slitting, aging stability and compatibility with the packaging’s end-of-life route. This transition is increasing the technical value of application laboratories and converter trials because adhesive performance depends on the complete combination of substrate treatment, ink, coating, drying conditions and packaged contents.

Market Dynamics

Drivers

Demand is supported by continuing growth in flexible packaging consumption, tighter control of volatile organic compound emissions and brand-owner efforts to improve

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workplace safety and reduce solvent handling. Food, beverage and daily consumer product manufacturers continue to adopt multilayer flexible formats because they use less material than many rigid alternatives and provide product protection, shelf-life extension and logistical efficiency. Water-based adhesives benefit where converters seek to eliminate solvent recovery equipment, lower fire and explosion risks and simplify regulatory compliance. Improvements in acrylic polymer design, polyurethane dispersion technology, crosslinking systems and solids content are widening the range of structures that can be processed at commercially acceptable speeds. Recycling guidelines and packaging-design requirements are creating an additional demand layer by encouraging adhesive systems that remain compatible with PE, PP, PET or paper recycling streams.

Restraints

The main restraint is the energy and time required to remove water from the adhesive layer. Drying performance depends on coating weight, oven length, airflow, temperature, humidity and substrate permeability, which can constrain line speed on existing laminators. Waterborne systems also face narrower process windows on poorly treated films and demanding multilayer structures, particularly where the package must tolerate aggressive contents, prolonged boiling or high-temperature retort treatment. Converters may need corona-treatment control, modified anilox rolls, improved ovens or additional technical support before switching from established solvent-based or solvent-free products. Competitive pressure from solvent-free polyurethane adhesives is significant because those systems offer high production speed and avoid both organic solvent emissions and water evaporation. The relative cost advantage of water-based products can also narrow when energy, drying capacity, waste during qualification and production downtime are considered.

Opportunities

The strongest opportunities are emerging in recyclable paper-film laminates, mono-material flexible packaging, compostable structures and higher-performance waterborne systems for metallized or barrier packaging. High-solids acrylic products provide an opportunity to improve drying efficiency and enable faster post-lamination slitting, while crosslinkable acrylic and waterborne polyurethane systems can extend performance into more demanding food and non-food applications. Paper-based packaging creates additional demand for adhesives that bond paper to polymer films or barrier layers without disrupting fiber recovery. Compostable adhesives can support certified

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structures when combined with suitable films and paper. Growth opportunities are also expanding in China, India and Southeast Asia, where flexible-packaging converting capacity, packaged-food consumption and local adhesive production are developing together. Suppliers able to combine regional manufacturing, food-contact compliance, application testing and customized formulation are positioned to capture business that previously depended on imported solvent-based systems.

Challenges

The industry faces the long-term challenge of proving that environmental improvement does not compromise converting productivity or package reliability. Water-based adhesive selection cannot be separated from inks, coatings, substrate treatment and the intended recycling process, creating qualification procedures that are longer than simple laboratory bond testing. Food-contact and migration requirements vary by jurisdiction, while packaged products such as oils, acids, fragrances, detergents and pharmaceuticals impose different chemical-resistance demands. Recycling claims also require structure-level assessment because an adhesive that performs well in one polymer stream may not be compatible with another. Smaller regional producers face additional pressure from the cost of regulatory testing, application laboratories and technical service. At the same time, strong price competition in general-purpose acrylic adhesives may limit the resources available for advanced product development, encouraging consolidation and technology partnerships.

Industry Chain Analysis

The upstream industry supplies acrylic monomers, polyurethane dispersion raw materials, polyols, isocyanate-derived crosslinkers, surfactants, defoamers, rheology modifiers, wetting agents, preservatives and functional additives. Raw-material selection determines polymer cost, solids content, viscosity, film formation, food-contact status and resistance to heat, moisture and chemicals. Acrylic emulsions generally offer competitive cost, high formulation flexibility and strong applicability in paper and general flexible structures. Waterborne polyurethane and hybrid systems create higher value through improved adhesion to difficult films and stronger thermal or chemical resistance, but they usually carry higher formulation and qualification costs. Variations in acrylic monomer, specialty polyol, additive, energy and logistics costs influence selling prices, although formulation know-how and customer approval often matter more than individual raw-material prices.

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The midstream consists of polymerization, adhesive formulation, blending, filtration, quality control, packaging and application support. Manufacturers may produce their own acrylic emulsions or polyurethane dispersions, or formulate purchased polymer dispersions into complete laminating systems. Value creation is concentrated in formulation performance, food-contact documentation, batch consistency and the ability to reproduce results on the customer's laminator. Downstream customers are flexible-packaging converters, printing and laminating companies and integrated packaging producers. They apply the adhesive between films, paper, foil or metallized substrates before curing, slitting and converting the laminate into pouches, sachets, lidding materials or rollstock. Adhesive cost represents a limited portion of the finished package, but bonding failure can result in delamination, leakage, migration risk and product loss, giving validated suppliers greater customer retention and pricing stability.

Segment Insights

Acrylic Water-Based Laminating Adhesives represent the largest product segment because they combine cost efficiency, formulation flexibility, good clarity and established performance in paper, film and metallized-film structures. High-solids acrylic emulsions are strengthening this segment by improving drying efficiency and initial bond strength. Waterborne Polyurethane Laminating Adhesives occupy a smaller but higher-value position where heat resistance, chemical resistance and adhesion to difficult substrates are more important. Acrylic PUD Hybrid Laminating Adhesives bridge the cost-performance gap and allow suppliers to tailor green tack, flexibility and resistance without relying solely on a pure polyurethane system. Other water-based polymer adhesives remain application-specific and are appropriately grouped as a residual segment.

By component system, one-component products remain important in general-purpose and operationally simple applications, while two-component products gain relevance where crosslinking is required for higher resistance. By lamination process, dry-bond products account for the principal opportunity in film-containing flexible structures, whereas wet-bond products remain concentrated in structures containing absorbent paper or board. Product competition is therefore moving from broad resin labels toward clearly defined combinations of substrate interface, drying capability, packaged contents and end-of-life requirements.

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Downstream Market Opportunities

Food packaging remains the principal downstream opportunity, led by dry foods and snacks, fresh produce, coffee and tea, dairy products and prepared or retort foods. Each application creates a different balance between bond strength, barrier integrity, heat resistance and chemical resistance. Pet food, pharmaceutical products, personal care products and household chemical refills offer attractive higher-performance opportunities because packaging failure carries greater product-protection or safety consequences. The expansion of paper-based packs, lightweight refill pouches and recyclable mono-material structures is changing adhesive selection from a purchasing decision based mainly on unit cost into a packaging-engineering decision. Suppliers that participate early in structure design and qualification can capture a larger share of value through customized products, crosslinkers, technical service and regulatory documentation.

Regional Insights

Asia-Pacific is the largest regional market, supported by its extensive flexible-packaging, film, printing, food-processing and consumer-goods manufacturing base. China combines large-scale packaging conversion with an increasingly broad domestic supplier base ranging from listed adhesive manufacturers to specialized regional producers. India has developed an integrated ecosystem covering packaging films, flexible packaging conversion, inks and laminating adhesives, supporting faster localization of supply. Japan maintains a strong position in high-performance packaging technologies and regulatory-quality products, while South Korea and Southeast Asia are more dependent on regional manufacturing operations of international groups and imported specialty formulations. DIC operates multiple production and product-development sites across Asia-Pacific, while integrated packaging groups in India continue to expand packaging and recycling capacity.

Europe is a major center for high-solids acrylic systems, recycling-compatible adhesives, compostable structures and regulatory-driven product development. Demand increasingly reflects recyclability testing and packaging-design requirements rather than only VOC reduction. North America has a mature flexible-packaging conversion industry and a strong base of multinational and specialist adhesive suppliers; its opportunity is concentrated in performance upgrades, food-contact applications and replacement of older solvent-based systems. Turkey has developed a regional supply position linking Europe, the Middle East and surrounding packaging

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markets. Latin America, the Middle East and Africa remain smaller but commercially relevant markets where local technical service, import substitution and packaged-food investment can support above-average supplier expansion.

Competitive Landscape Analysis

The competitive landscape combines diversified global adhesive groups, polymer and specialty-material companies, integrated packaging manufacturers and regional formulation specialists. Global groups compete through broad product portfolios, international food-contact support, manufacturing networks and application laboratories, while specialist producers compete through faster formulation adjustment, local technical service and lower delivery costs. The market is not fully concentrated because general-purpose water-based acrylic products can be produced by numerous regional manufacturers, particularly in China, India, Europe and North America. The technically demanding portion is more consolidated because high-performance film structures require polymer design capability, migration documentation, converter trials and long customer-approval cycles. Recent consolidation has strengthened the scale of multinational flexible-packaging adhesive platforms, including Arkema’s integration of acquired packaging-adhesive businesses. Competition is increasingly based on the ability to supply a complete validated system rather than a standalone liquid adhesive. Suppliers with high-solids technology, waterborne polyurethane expertise, local production, recycling-test evidence and direct converter relationships are likely to strengthen their position, while companies dependent on undifferentiated low-solids acrylic products face greater price pressure.

Report Scope

This report is a detailed and comprehensive analysis for global Water-Based Laminating Adhesives for Flexible Packaging market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

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Global Water-Based Laminating Adhesives for Flexible Packaging market size and forecasts, in consumption value ($ Million), sales quantity (Tons), and average selling prices (US$/kg), 2021-2032

Global Water-Based Laminating Adhesives for Flexible Packaging market size and forecasts by region and country, in consumption value ($ Million), sales quantity (Tons), and average selling prices (US$/kg), 2021-2032

Global Water-Based Laminating Adhesives for Flexible Packaging market size and forecasts, by Type and by Application, in consumption value ($ Million), sales quantity (Tons), and average selling prices (US$/kg), 2021-2032

Global Water-Based Laminating Adhesives for Flexible Packaging market shares of main players, shipments in revenue ($ Million), sales quantity (Tons), and ASP (US$/kg), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Water-Based Laminating Adhesives for Flexible Packaging

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Water-Based Laminating Adhesives for Flexible Packaging market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Henkel AG & Co. KGaA, Arkema S.A., BASF SE, Trinseo PLC, MORCHEM, S.A., Aquapolymergroup SL, Makrochemical Endüstriyel Kimyasallar San. ve Tic. A.?., H.B. Fuller Company, Worthen Industries, Inc., Cattie Adhesives, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

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Water-Based Laminating Adhesives for Flexible Packaging market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market Segmentation

Market segment by Type

Acrylic Water-Based Laminating Adhesives

Waterborne Polyurethane Laminating Adhesives

Acrylic PUD Hybrid Laminating Adhesives

Other

Market segment by Lamination Process

Dry-Bond Lamination Adhesives

Wet-Bond Lamination Adhesives

Other

Market segment by Application

Dry Food and Snack Packaging

Fresh Produce Packaging

Coffee and Tea Packaging

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Dairy Product Packaging

Prepared and Retort Food Packaging

Sauces and Condiment Packaging

Pet Food Packaging

Pharmaceutical Product Packaging

Personal Care and Cosmetic Packaging

Household Chemical Packaging

Other

Major players covered

Henkel AG & Co. KGaA

Arkema S.A.

BASF SE

Trinseo PLC

MORCHEM, S.A.

Aquapolymergroup SL

Makrochemical Endüstriyel Kimyasallar San. ve Tic. A.?.

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ADMT Tronics Unlimited, Inc.

DIC Corporation

UFlex Limited

Jesons Industries Limited

Nan Pao Resins Chemical Co., Ltd.

Beijing Comens New Materials Co., Ltd.

Beijing Kingdo Dacheng New Materials Technology Co., Ltd.

Shanghai QXQC New Material Technology Co.,Ltd

Megabond Huangshan Adhesive Co., Ltd.

Guangdong Xinhui Chemical Co., Ltd.

Guangdong Baihe New Materials Technology Co., Ltd.

Liyang Shuangqiang Decoration Materials Co., Ltd.

Shanghai Duobang Chemical Co., Ltd.

Jiangsu Jinghong New Materials Technology Co., Ltd.

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

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Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Water-Based Laminating Adhesives for Flexible Packaging product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Water-Based Laminating Adhesives for Flexible Packaging, with price, sales quantity, revenue, and global market share of Water-Based Laminating Adhesives for Flexible Packaging from 2021 to 2026.

Chapter 3, the Water-Based Laminating Adhesives for Flexible Packaging competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Water-Based Laminating Adhesives for Flexible Packaging breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026.and Water-Based Laminating Adhesives for Flexible Packaging market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Water-Based Laminating Adhesives for Flexible Packaging.

Chapter 14 and 15, to describe Water-Based Laminating Adhesives for Flexible Packaging sales channel, distributors, customers, research findings and conclusion.

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Contents

1 MARKET OVERVIEW

1.1 Product Overview and Scope
1.2 Market Estimation Caveats and Base Year
1.3 Market Analysis by Type
  1.3.1 Overview: Global Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Type: 2021 Versus 2025 Versus 2032
  1.3.2 Acrylic Water-Based Laminating Adhesives
  1.3.3 Waterborne Polyurethane Laminating Adhesives
  1.3.4 Acrylic PUD Hybrid Laminating Adhesives
  1.3.5 Other
1.4 Market Analysis by Lamination Process
  1.4.1 Overview: Global Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Lamination Process: 2021 Versus 2025 Versus 2032
  1.4.2 Dry-Bond Lamination Adhesives
  1.4.3 Wet-Bond Lamination Adhesives
  1.4.4 Other
1.5 Market Analysis by Application
  1.5.1 Overview: Global Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Application: 2021 Versus 2025 Versus 2032
  1.5.2 Dry Food and Snack Packaging
  1.5.3 Fresh Produce Packaging
  1.5.4 Coffee and Tea Packaging
  1.5.5 Dairy Product Packaging
  1.5.6 Prepared and Retort Food Packaging
  1.5.7 Sauces and Condiment Packaging
  1.5.8 Pet Food Packaging
  1.5.9 Pharmaceutical Product Packaging
  1.5.10 Personal Care and Cosmetic Packaging
1.6 Global Water-Based Laminating Adhesives for Flexible Packaging Market Size & Forecast
  1.6.1 Global Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021 & 2025 & 2032)
  1.6.2 Global Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity (2021-2032)
  1.6.3 Global Water-Based Laminating Adhesives for Flexible Packaging Average Price (2021-2032)

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2 MANUFACTURERS PROFILES

2.1 Henkel AG & Co. KGaA
2.1.1 Henkel AG & Co. KGaA Details
2.1.2 Henkel AG & Co. KGaA Major Business
2.1.3 Henkel AG & Co. KGaA Water-Based Laminating Adhesives for Flexible Packaging Product and Services
2.1.4 Henkel AG & Co. KGaA Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.1.5 Henkel AG & Co. KGaA Recent Developments/Updates
2.2 Arkema S.A.
2.2.1 Arkema S.A. Details
2.2.2 Arkema S.A. Major Business
2.2.3 Arkema S.A. Water-Based Laminating Adhesives for Flexible Packaging Product and Services
2.2.4 Arkema S.A. Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.2.5 Arkema S.A. Recent Developments/Updates
2.3 BASF SE
2.3.1 BASF SE Details
2.3.2 BASF SE Major Business
2.3.3 BASF SE Water-Based Laminating Adhesives for Flexible Packaging Product and Services
2.3.4 BASF SE Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.3.5 BASF SE Recent Developments/Updates
2.4 Trinseo PLC
2.4.1 Trinseo PLC Details
2.4.2 Trinseo PLC Major Business
2.4.3 Trinseo PLC Water-Based Laminating Adhesives for Flexible Packaging Product and Services
2.4.4 Trinseo PLC Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.4.5 Trinseo PLC Recent Developments/Updates
2.5 MORCHEM, S.A.
2.5.1 MORCHEM, S.A. Details
2.5.2 MORCHEM, S.A. Major Business

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2.5.3 MORCHEM, S.A. Water-Based Laminating Adhesives for Flexible Packaging Product and Services
2.5.4 MORCHEM, S.A. Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.5.5 MORCHEM, S.A. Recent Developments/Updates
2.6 Aquapolymergroup SL
2.6.1 Aquapolymergroup SL Details
2.6.2 Aquapolymergroup SL Major Business
2.6.3 Aquapolymergroup SL Water-Based Laminating Adhesives for Flexible Packaging Product and Services
2.6.4 Aquapolymergroup SL Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.6.5 Aquapolymergroup SL Recent Developments/Updates
2.7 Makrochemical Endüstriyel Kimyasallar San. ve Tic. A.?.
2.7.1 Makrochemical Endüstriyel Kimyasallar San. ve Tic. A.?. Details
2.7.2 Makrochemical Endüstriyel Kimyasallar San. ve Tic. A.?. Major Business
2.7.3 Makrochemical Endüstriyel Kimyasallar San. ve Tic. A.?. Water-Based Laminating Adhesives for Flexible Packaging Product and Services
2.7.4 Makrochemical Endüstriyel Kimyasallar San. ve Tic. A.?. Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.7.5 Makrochemical Endüstriyel Kimyasallar San. ve Tic. A.?. Recent Developments/Updates
2.8 H.B. Fuller Company
2.8.1 H.B. Fuller Company Details
2.8.2 H.B. Fuller Company Major Business
2.8.3 H.B. Fuller Company Water-Based Laminating Adhesives for Flexible Packaging Product and Services
2.8.4 H.B. Fuller Company Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.8.5 H.B. Fuller Company Recent Developments/Updates
2.9 Worthen Industries, Inc.
2.9.1 Worthen Industries, Inc. Details
2.9.2 Worthen Industries, Inc. Major Business
2.9.3 Worthen Industries, Inc. Water-Based Laminating Adhesives for Flexible Packaging Product and Services
2.9.4 Worthen Industries, Inc. Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity, Average Price, Revenue, Gross Margin and Market Share

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(2021-2026)
2.9.5 Worthen Industries, Inc. Recent Developments/Updates
2.10 Cattie Adhesives
2.10.1 Cattie Adhesives Details
2.10.2 Cattie Adhesives Major Business
2.10.3 Cattie Adhesives Water-Based Laminating Adhesives for Flexible Packaging Product and Services
2.10.4 Cattie Adhesives Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.10.5 Cattie Adhesives Recent Developments/Updates
2.11 ADMT Tronics Unlimited, Inc.
2.11.1 ADMT Tronics Unlimited, Inc. Details
2.11.2 ADMT Tronics Unlimited, Inc. Major Business
2.11.3 ADMT Tronics Unlimited, Inc. Water-Based Laminating Adhesives for Flexible Packaging Product and Services
2.11.4 ADMT Tronics Unlimited, Inc. Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.11.5 ADMT Tronics Unlimited, Inc. Recent Developments/Updates
2.12 DIC Corporation
2.12.1 DIC Corporation Details
2.12.2 DIC Corporation Major Business
2.12.3 DIC Corporation Water-Based Laminating Adhesives for Flexible Packaging Product and Services
2.12.4 DIC Corporation Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.12.5 DIC Corporation Recent Developments/Updates
2.13 UFlex Limited
2.13.1 UFlex Limited Details
2.13.2 UFlex Limited Major Business
2.13.3 UFlex Limited Water-Based Laminating Adhesives for Flexible Packaging Product and Services
2.13.4 UFlex Limited Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.13.5 UFlex Limited Recent Developments/Updates
2.14 Jesons Industries Limited
2.14.1 Jesons Industries Limited Details
2.14.2 Jesons Industries Limited Major Business
2.14.3 Jesons Industries Limited Water-Based Laminating Adhesives for Flexible

+357 96 030922
info@marketpublishers.com

Packaging Product and Services
2.14.4 Jesons Industries Limited Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.14.5 Jesons Industries Limited Recent Developments/Updates
2.15 Nan Pao Resins Chemical Co., Ltd.
2.15.1 Nan Pao Resins Chemical Co., Ltd. Details
2.15.2 Nan Pao Resins Chemical Co., Ltd. Major Business
2.15.3 Nan Pao Resins Chemical Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Product and Services
2.15.4 Nan Pao Resins Chemical Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.15.5 Nan Pao Resins Chemical Co., Ltd. Recent Developments/Updates
2.16 Beijing Comens New Materials Co., Ltd.
2.16.1 Beijing Comens New Materials Co., Ltd. Details
2.16.2 Beijing Comens New Materials Co., Ltd. Major Business
2.16.3 Beijing Comens New Materials Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Product and Services
2.16.4 Beijing Comens New Materials Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.16.5 Beijing Comens New Materials Co., Ltd. Recent Developments/Updates
2.17 Beijing Kingdo Dacheng New Materials Technology Co., Ltd.
2.17.1 Beijing Kingdo Dacheng New Materials Technology Co., Ltd. Details
2.17.2 Beijing Kingdo Dacheng New Materials Technology Co., Ltd. Major Business
2.17.3 Beijing Kingdo Dacheng New Materials Technology Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Product and Services
2.17.4 Beijing Kingdo Dacheng New Materials Technology Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.17.5 Beijing Kingdo Dacheng New Materials Technology Co., Ltd. Recent Developments/Updates
2.18 Shanghai QXQC New Material Technology Co.,Ltd
2.18.1 Shanghai QXQC New Material Technology Co.,Ltd Details
2.18.2 Shanghai QXQC New Material Technology Co.,Ltd Major Business
2.18.3 Shanghai QXQC New Material Technology Co.,Ltd Water-Based Laminating Adhesives for Flexible Packaging Product and Services
2.18.4 Shanghai QXQC New Material Technology Co.,Ltd Water-Based Laminating

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Adhesives for Flexible Packaging Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.18.5 Shanghai QXQC New Material Technology Co.,Ltd Recent Developments/Updates
2.19 Megabond Huangshan Adhesive Co., Ltd.
2.19.1 Megabond Huangshan Adhesive Co., Ltd. Details
2.19.2 Megabond Huangshan Adhesive Co., Ltd. Major Business
2.19.3 Megabond Huangshan Adhesive Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Product and Services
2.19.4 Megabond Huangshan Adhesive Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.19.5 Megabond Huangshan Adhesive Co., Ltd. Recent Developments/Updates
2.20 Guangdong Xinhui Chemical Co., Ltd.
2.20.1 Guangdong Xinhui Chemical Co., Ltd. Details
2.20.2 Guangdong Xinhui Chemical Co., Ltd. Major Business
2.20.3 Guangdong Xinhui Chemical Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Product and Services
2.20.4 Guangdong Xinhui Chemical Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.20.5 Guangdong Xinhui Chemical Co., Ltd. Recent Developments/Updates
2.21 Guangdong Baihe New Materials Technology Co., Ltd.
2.21.1 Guangdong Baihe New Materials Technology Co., Ltd. Details
2.21.2 Guangdong Baihe New Materials Technology Co., Ltd. Major Business
2.21.3 Guangdong Baihe New Materials Technology Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Product and Services
2.21.4 Guangdong Baihe New Materials Technology Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.21.5 Guangdong Baihe New Materials Technology Co., Ltd. Recent Developments/Updates
2.22 Liyang Shuangqiang Decoration Materials Co., Ltd.
2.22.1 Liyang Shuangqiang Decoration Materials Co., Ltd. Details
2.22.2 Liyang Shuangqiang Decoration Materials Co., Ltd. Major Business
2.22.3 Liyang Shuangqiang Decoration Materials Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Product and Services
2.22.4 Liyang Shuangqiang Decoration Materials Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity, Average Price, Revenue, Gross

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Margin and Market Share (2021-2026)
2.22.5 Liyang Shuangqiang Decoration Materials Co., Ltd. Recent Developments/Updates
2.23 Shanghai Duobang Chemical Co., Ltd.
2.23.1 Shanghai Duobang Chemical Co., Ltd. Details
2.23.2 Shanghai Duobang Chemical Co., Ltd. Major Business
2.23.3 Shanghai Duobang Chemical Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Product and Services
2.23.4 Shanghai Duobang Chemical Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.23.5 Shanghai Duobang Chemical Co., Ltd. Recent Developments/Updates
2.24 Jiangsu Jinghong New Materials Technology Co., Ltd.
2.24.1 Jiangsu Jinghong New Materials Technology Co., Ltd. Details
2.24.2 Jiangsu Jinghong New Materials Technology Co., Ltd. Major Business
2.24.3 Jiangsu Jinghong New Materials Technology Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Product and Services
2.24.4 Jiangsu Jinghong New Materials Technology Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.24.5 Jiangsu Jinghong New Materials Technology Co., Ltd. Recent Developments/Updates

3 COMPETITIVE ENVIRONMENT: WATER-BASED LAMINATING ADHESIVES FOR FLEXIBLE PACKAGING BY MANUFACTURER

3.1 Global Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Manufacturer (2021-2026)
3.2 Global Water-Based Laminating Adhesives for Flexible Packaging Revenue by Manufacturer (2021-2026)
3.3 Global Water-Based Laminating Adhesives for Flexible Packaging Average Price by Manufacturer (2021-2026)
3.4 Market Share Analysis (2025)
3.4.1 Producer Shipments of Water-Based Laminating Adhesives for Flexible Packaging by Manufacturer Revenue ($MM) and Market Share (%): 2025
3.4.2 Top 3 Water-Based Laminating Adhesives for Flexible Packaging Manufacturer Market Share in 2025
3.4.3 Top 6 Water-Based Laminating Adhesives for Flexible Packaging Manufacturer Market Share in 2025

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3.5 Water-Based Laminating Adhesives for Flexible Packaging Market: Overall Company Footprint Analysis
3.5.1 Water-Based Laminating Adhesives for Flexible Packaging Market: Region Footprint
3.5.2 Water-Based Laminating Adhesives for Flexible Packaging Market: Company Product Type Footprint
3.5.3 Water-Based Laminating Adhesives for Flexible Packaging Market: Company Product Application Footprint
3.6 New Market Entrants and Barriers to Market Entry
3.7 Mergers, Acquisition, Agreements, and Collaborations

4 CONSUMPTION ANALYSIS BY REGION

4.1 Global Water-Based Laminating Adhesives for Flexible Packaging Market Size by Region
4.1.1 Global Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Region (2021-2032)
4.1.2 Global Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Region (2021-2032)
4.1.3 Global Water-Based Laminating Adhesives for Flexible Packaging Average Price by Region (2021-2032)
4.2 North America Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032)
4.3 Europe Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032)
4.4 Asia-Pacific Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032)
4.5 South America Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032)
4.6 Middle East & Africa Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032)

5 MARKET SEGMENT BY TYPE

5.1 Global Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Type (2021-2032)
5.2 Global Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Type (2021-2032)
5.3 Global Water-Based Laminating Adhesives for Flexible Packaging Average Price by

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Type (2021-2032)

6 MARKET SEGMENT BY APPLICATION

6.1 Global Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Application (2021-2032)
6.2 Global Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Application (2021-2032)
6.3 Global Water-Based Laminating Adhesives for Flexible Packaging Average Price by Application (2021-2032)

7 NORTH AMERICA

7.1 North America Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Type (2021-2032)
7.2 North America Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Application (2021-2032)
7.3 North America Water-Based Laminating Adhesives for Flexible Packaging Market Size by Country
  7.3.1 North America Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Country (2021-2032)
  7.3.2 North America Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Country (2021-2032)
  7.3.3 United States Market Size and Forecast (2021-2032)
  7.3.4 Canada Market Size and Forecast (2021-2032)
  7.3.5 Mexico Market Size and Forecast (2021-2032)

8 EUROPE

8.1 Europe Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Type (2021-2032)
8.2 Europe Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Application (2021-2032)
8.3 Europe Water-Based Laminating Adhesives for Flexible Packaging Market Size by Country
  8.3.1 Europe Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Country (2021-2032)
  8.3.2 Europe Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Country (2021-2032)

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8.3.3 Germany Market Size and Forecast (2021-2032)
8.3.4 France Market Size and Forecast (2021-2032)
8.3.5 United Kingdom Market Size and Forecast (2021-2032)
8.3.6 Russia Market Size and Forecast (2021-2032)
8.3.7 Italy Market Size and Forecast (2021-2032)

9 ASIA-PACIFIC

9.1 Asia-Pacific Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Type (2021-2032)
9.2 Asia-Pacific Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Application (2021-2032)
9.3 Asia-Pacific Water-Based Laminating Adhesives for Flexible Packaging Market Size by Region
9.3.1 Asia-Pacific Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Region (2021-2032)
9.3.2 Asia-Pacific Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Region (2021-2032)
9.3.3 China Market Size and Forecast (2021-2032)
9.3.4 Japan Market Size and Forecast (2021-2032)
9.3.5 South Korea Market Size and Forecast (2021-2032)
9.3.6 India Market Size and Forecast (2021-2032)
9.3.7 Southeast Asia Market Size and Forecast (2021-2032)
9.3.8 Australia Market Size and Forecast (2021-2032)

10 SOUTH AMERICA

10.1 South America Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Type (2021-2032)
10.2 South America Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Application (2021-2032)
10.3 South America Water-Based Laminating Adhesives for Flexible Packaging Market Size by Country
10.3.1 South America Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Country (2021-2032)
10.3.2 South America Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Country (2021-2032)
10.3.3 Brazil Market Size and Forecast (2021-2032)
10.3.4 Argentina Market Size and Forecast (2021-2032)

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11 MIDDLE EAST & AFRICA

11.1 Middle East & Africa Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Type (2021-2032)
11.2 Middle East & Africa Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Application (2021-2032)
11.3 Middle East & Africa Water-Based Laminating Adhesives for Flexible Packaging Market Size by Country
  11.3.1 Middle East & Africa Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Country (2021-2032)
  11.3.2 Middle East & Africa Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Country (2021-2032)
  11.3.3 Turkey Market Size and Forecast (2021-2032)
  11.3.4 Egypt Market Size and Forecast (2021-2032)
  11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)
  11.3.6 South Africa Market Size and Forecast (2021-2032)

12 MARKET DYNAMICS

12.1 Water-Based Laminating Adhesives for Flexible Packaging Market Drivers
12.2 Water-Based Laminating Adhesives for Flexible Packaging Market Restraints
12.3 Water-Based Laminating Adhesives for Flexible Packaging Trends Analysis
12.4 Porters Five Forces Analysis
  12.4.1 Threat of New Entrants
  12.4.2 Bargaining Power of Suppliers
  12.4.3 Bargaining Power of Buyers
  12.4.4 Threat of Substitutes
  12.4.5 Competitive Rivalry

13 RAW MATERIAL AND INDUSTRY CHAIN

13.1 Raw Material of Water-Based Laminating Adhesives for Flexible Packaging and Key Manufacturers
13.2 Manufacturing Costs Percentage of Water-Based Laminating Adhesives for Flexible Packaging
13.3 Water-Based Laminating Adhesives for Flexible Packaging Production Process
13.4 Industry Value Chain Analysis

+357 96 030922
info@marketpublishers.com

14 SHIPMENTS BY DISTRIBUTION CHANNEL

14.1 Sales Channel
  14.1.1 Direct to End-User
  14.1.2 Distributors
14.2 Water-Based Laminating Adhesives for Flexible Packaging Typical Distributors
14.3 Water-Based Laminating Adhesives for Flexible Packaging Typical Customers

15 RESEARCH FINDINGS AND CONCLUSION

16 APPENDIX

16.1 Methodology
16.2 Research Process and Data Source
16.3 Disclaimer

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info@marketpublishers.com

List Of Tables

LIST OF TABLES

Table 1. Global Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Type, (USD Million), 2021 & 2025 & 2032
Table 2. Global Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Lamination Process, (USD Million), 2021 & 2025 & 2032
Table 3. Global Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
Table 4. Henkel AG & Co. KGaA Basic Information, Manufacturing Base and Competitors
Table 5. Henkel AG & Co. KGaA Major Business
Table 6. Henkel AG & Co. KGaA Water-Based Laminating Adhesives for Flexible Packaging Product and Services
Table 7. Henkel AG & Co. KGaA Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity (Tons), Average Price (US$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 8. Henkel AG & Co. KGaA Recent Developments/Updates
Table 9. Arkema S.A. Basic Information, Manufacturing Base and Competitors
Table 10. Arkema S.A. Major Business
Table 11. Arkema S.A. Water-Based Laminating Adhesives for Flexible Packaging Product and Services
Table 12. Arkema S.A. Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity (Tons), Average Price (US$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 13. Arkema S.A. Recent Developments/Updates
Table 14. BASF SE Basic Information, Manufacturing Base and Competitors
Table 15. BASF SE Major Business
Table 16. BASF SE Water-Based Laminating Adhesives for Flexible Packaging Product and Services
Table 17. BASF SE Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity (Tons), Average Price (US$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 18. BASF SE Recent Developments/Updates
Table 19. Trinseo PLC Basic Information, Manufacturing Base and Competitors
Table 20. Trinseo PLC Major Business
Table 21. Trinseo PLC Water-Based Laminating Adhesives for Flexible Packaging Product and Services

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Table 22. Trinseo PLC Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity (Tons), Average Price (US$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 23. Trinseo PLC Recent Developments/Updates
Table 24. MORCHEM, S.A. Basic Information, Manufacturing Base and Competitors
Table 25. MORCHEM, S.A. Major Business
Table 26. MORCHEM, S.A. Water-Based Laminating Adhesives for Flexible Packaging Product and Services
Table 27. MORCHEM, S.A. Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity (Tons), Average Price (US$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 28. MORCHEM, S.A. Recent Developments/Updates
Table 29. Aquapolymergroup SL Basic Information, Manufacturing Base and Competitors
Table 30. Aquapolymergroup SL Major Business
Table 31. Aquapolymergroup SL Water-Based Laminating Adhesives for Flexible Packaging Product and Services
Table 32. Aquapolymergroup SL Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity (Tons), Average Price (US$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 33. Aquapolymergroup SL Recent Developments/Updates
Table 34. Makrochemical Endüstriyel Kimyasallar San. ve Tic. A.?. Basic Information, Manufacturing Base and Competitors
Table 35. Makrochemical Endüstriyel Kimyasallar San. ve Tic. A.?. Major Business
Table 36. Makrochemical Endüstriyel Kimyasallar San. ve Tic. A.?. Water-Based Laminating Adhesives for Flexible Packaging Product and Services
Table 37. Makrochemical Endüstriyel Kimyasallar San. ve Tic. A.?. Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity (Tons), Average Price (US$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 38. Makrochemical Endüstriyel Kimyasallar San. ve Tic. A.?. Recent Developments/Updates
Table 39. H.B. Fuller Company Basic Information, Manufacturing Base and Competitors
Table 40. H.B. Fuller Company Major Business
Table 41. H.B. Fuller Company Water-Based Laminating Adhesives for Flexible Packaging Product and Services
Table 42. H.B. Fuller Company Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity (Tons), Average Price (US$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 43. H.B. Fuller Company Recent Developments/Updates

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Table 44. Worthen Industries, Inc. Basic Information, Manufacturing Base and Competitors
Table 45. Worthen Industries, Inc. Major Business
Table 46. Worthen Industries, Inc. Water-Based Laminating Adhesives for Flexible Packaging Product and Services
Table 47. Worthen Industries, Inc. Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity (Tons), Average Price (US$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 48. Worthen Industries, Inc. Recent Developments/Updates
Table 49. Cattie Adhesives Basic Information, Manufacturing Base and Competitors
Table 50. Cattie Adhesives Major Business
Table 51. Cattie Adhesives Water-Based Laminating Adhesives for Flexible Packaging Product and Services
Table 52. Cattie Adhesives Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity (Tons), Average Price (US$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 53. Cattie Adhesives Recent Developments/Updates
Table 54. ADMT Tronics Unlimited, Inc. Basic Information, Manufacturing Base and Competitors
Table 55. ADMT Tronics Unlimited, Inc. Major Business
Table 56. ADMT Tronics Unlimited, Inc. Water-Based Laminating Adhesives for Flexible Packaging Product and Services
Table 57. ADMT Tronics Unlimited, Inc. Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity (Tons), Average Price (US$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 58. ADMT Tronics Unlimited, Inc. Recent Developments/Updates
Table 59. DIC Corporation Basic Information, Manufacturing Base and Competitors
Table 60. DIC Corporation Major Business
Table 61. DIC Corporation Water-Based Laminating Adhesives for Flexible Packaging Product and Services
Table 62. DIC Corporation Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity (Tons), Average Price (US$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 63. DIC Corporation Recent Developments/Updates
Table 64. UFlex Limited Basic Information, Manufacturing Base and Competitors
Table 65. UFlex Limited Major Business
Table 66. UFlex Limited Water-Based Laminating Adhesives for Flexible Packaging Product and Services
Table 67. UFlex Limited Water-Based Laminating Adhesives for Flexible Packaging

+357 96 030922
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Sales Quantity (Tons), Average Price (US$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 68. UFlex Limited Recent Developments/Updates
Table 69. Jesons Industries Limited Basic Information, Manufacturing Base and Competitors
Table 70. Jesons Industries Limited Major Business
Table 71. Jesons Industries Limited Water-Based Laminating Adhesives for Flexible Packaging Product and Services
Table 72. Jesons Industries Limited Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity (Tons), Average Price (US$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 73. Jesons Industries Limited Recent Developments/Updates
Table 74. Nan Pao Resins Chemical Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 75. Nan Pao Resins Chemical Co., Ltd. Major Business
Table 76. Nan Pao Resins Chemical Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Product and Services
Table 77. Nan Pao Resins Chemical Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity (Tons), Average Price (US$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 78. Nan Pao Resins Chemical Co., Ltd. Recent Developments/Updates
Table 79. Beijing Comens New Materials Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 80. Beijing Comens New Materials Co., Ltd. Major Business
Table 81. Beijing Comens New Materials Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Product and Services
Table 82. Beijing Comens New Materials Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity (Tons), Average Price (US$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 83. Beijing Comens New Materials Co., Ltd. Recent Developments/Updates
Table 84. Beijing Kingdo Dacheng New Materials Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 85. Beijing Kingdo Dacheng New Materials Technology Co., Ltd. Major Business
Table 86. Beijing Kingdo Dacheng New Materials Technology Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Product and Services
Table 87. Beijing Kingdo Dacheng New Materials Technology Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity (Tons), Average Price (US$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 88. Beijing Kingdo Dacheng New Materials Technology Co., Ltd. Recent

+357 96 030922
info@marketpublishers.com

Developments/Updates
Table 89. Shanghai QXQC New Material Technology Co.,Ltd Basic Information, Manufacturing Base and Competitors
Table 90. Shanghai QXQC New Material Technology Co.,Ltd Major Business
Table 91. Shanghai QXQC New Material Technology Co.,Ltd Water-Based Laminating Adhesives for Flexible Packaging Product and Services
Table 92. Shanghai QXQC New Material Technology Co.,Ltd Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity (Tons), Average Price (US$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 93. Shanghai QXQC New Material Technology Co.,Ltd Recent Developments/Updates
Table 94. Megabond Huangshan Adhesive Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 95. Megabond Huangshan Adhesive Co., Ltd. Major Business
Table 96. Megabond Huangshan Adhesive Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Product and Services
Table 97. Megabond Huangshan Adhesive Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity (Tons), Average Price (US$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 98. Megabond Huangshan Adhesive Co., Ltd. Recent Developments/Updates
Table 99. Guangdong Xinhui Chemical Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 100. Guangdong Xinhui Chemical Co., Ltd. Major Business
Table 101. Guangdong Xinhui Chemical Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Product and Services
Table 102. Guangdong Xinhui Chemical Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity (Tons), Average Price (US$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 103. Guangdong Xinhui Chemical Co., Ltd. Recent Developments/Updates
Table 104. Guangdong Baihe New Materials Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 105. Guangdong Baihe New Materials Technology Co., Ltd. Major Business
Table 106. Guangdong Baihe New Materials Technology Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Product and Services
Table 107. Guangdong Baihe New Materials Technology Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity (Tons), Average Price (US$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 108. Guangdong Baihe New Materials Technology Co., Ltd. Recent Developments/Updates

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Table 109. Liyang Shuangqiang Decoration Materials Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 110. Liyang Shuangqiang Decoration Materials Co., Ltd. Major Business
Table 111. Liyang Shuangqiang Decoration Materials Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Product and Services
Table 112. Liyang Shuangqiang Decoration Materials Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity (Tons), Average Price (US$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 113. Liyang Shuangqiang Decoration Materials Co., Ltd. Recent Developments/Updates
Table 114. Shanghai Duobang Chemical Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 115. Shanghai Duobang Chemical Co., Ltd. Major Business
Table 116. Shanghai Duobang Chemical Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Product and Services
Table 117. Shanghai Duobang Chemical Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity (Tons), Average Price (US$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 118. Shanghai Duobang Chemical Co., Ltd. Recent Developments/Updates
Table 119. Jiangsu Jinghong New Materials Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 120. Jiangsu Jinghong New Materials Technology Co., Ltd. Major Business
Table 121. Jiangsu Jinghong New Materials Technology Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Product and Services
Table 122. Jiangsu Jinghong New Materials Technology Co., Ltd. Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity (Tons), Average Price (US$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 123. Jiangsu Jinghong New Materials Technology Co., Ltd. Recent Developments/Updates
Table 124. Global Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Manufacturer (2021-2026) & (Tons)
Table 125. Global Water-Based Laminating Adhesives for Flexible Packaging Revenue by Manufacturer (2021-2026) & (USD Million)
Table 126. Global Water-Based Laminating Adhesives for Flexible Packaging Average Price by Manufacturer (2021-2026) & (US$/kg)
Table 127. Market Position of Manufacturers in Water-Based Laminating Adhesives for Flexible Packaging, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025
Table 128. Head Office and Water-Based Laminating Adhesives for Flexible Packaging Production Site of Key Manufacturer

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Table 129. Water-Based Laminating Adhesives for Flexible Packaging Market: Company Product Type Footprint
Table 130. Water-Based Laminating Adhesives for Flexible Packaging Market: Company Product Application Footprint
Table 131. Water-Based Laminating Adhesives for Flexible Packaging New Market Entrants and Barriers to Market Entry
Table 132. Water-Based Laminating Adhesives for Flexible Packaging Mergers, Acquisition, Agreements, and Collaborations
Table 133. Global Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR
Table 134. Global Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Region (2021-2026) & (Tons)
Table 135. Global Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Region (2027-2032) & (Tons)
Table 136. Global Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Region (2021-2026) & (USD Million)
Table 137. Global Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Region (2027-2032) & (USD Million)
Table 138. Global Water-Based Laminating Adhesives for Flexible Packaging Average Price by Region (2021-2026) & (US$/kg)
Table 139. Global Water-Based Laminating Adhesives for Flexible Packaging Average Price by Region (2027-2032) & (US$/kg)
Table 140. Global Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Type (2021-2026) & (Tons)
Table 141. Global Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Type (2027-2032) & (Tons)
Table 142. Global Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Type (2021-2026) & (USD Million)
Table 143. Global Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Type (2027-2032) & (USD Million)
Table 144. Global Water-Based Laminating Adhesives for Flexible Packaging Average Price by Type (2021-2026) & (US$/kg)
Table 145. Global Water-Based Laminating Adhesives for Flexible Packaging Average Price by Type (2027-2032) & (US$/kg)
Table 146. Global Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Application (2021-2026) & (Tons)
Table 147. Global Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Application (2027-2032) & (Tons)
Table 148. Global Water-Based Laminating Adhesives for Flexible Packaging

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Consumption Value by Application (2021-2026) & (USD Million)
Table 149. Global Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Application (2027-2032) & (USD Million)
Table 150. Global Water-Based Laminating Adhesives for Flexible Packaging Average Price by Application (2021-2026) & (US$/kg)
Table 151. Global Water-Based Laminating Adhesives for Flexible Packaging Average Price by Application (2027-2032) & (US$/kg)
Table 152. North America Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Type (2021-2026) & (Tons)
Table 153. North America Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Type (2027-2032) & (Tons)
Table 154. North America Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Application (2021-2026) & (Tons)
Table 155. North America Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Application (2027-2032) & (Tons)
Table 156. North America Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Country (2021-2026) & (Tons)
Table 157. North America Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Country (2027-2032) & (Tons)
Table 158. North America Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Country (2021-2026) & (USD Million)
Table 159. North America Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Country (2027-2032) & (USD Million)
Table 160. Europe Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Type (2021-2026) & (Tons)
Table 161. Europe Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Type (2027-2032) & (Tons)
Table 162. Europe Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Application (2021-2026) & (Tons)
Table 163. Europe Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Application (2027-2032) & (Tons)
Table 164. Europe Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Country (2021-2026) & (Tons)
Table 165. Europe Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Country (2027-2032) & (Tons)
Table 166. Europe Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Country (2021-2026) & (USD Million)
Table 167. Europe Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Country (2027-2032) & (USD Million)

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Table 168. Asia-Pacific Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Type (2021-2026) & (Tons)
Table 169. Asia-Pacific Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Type (2027-2032) & (Tons)
Table 170. Asia-Pacific Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Application (2021-2026) & (Tons)
Table 171. Asia-Pacific Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Application (2027-2032) & (Tons)
Table 172. Asia-Pacific Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Region (2021-2026) & (Tons)
Table 173. Asia-Pacific Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Region (2027-2032) & (Tons)
Table 174. Asia-Pacific Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Region (2021-2026) & (USD Million)
Table 175. Asia-Pacific Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Region (2027-2032) & (USD Million)
Table 176. South America Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Type (2021-2026) & (Tons)
Table 177. South America Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Type (2027-2032) & (Tons)
Table 178. South America Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Application (2021-2026) & (Tons)
Table 179. South America Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Application (2027-2032) & (Tons)
Table 180. South America Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Country (2021-2026) & (Tons)
Table 181. South America Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Country (2027-2032) & (Tons)
Table 182. South America Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Country (2021-2026) & (USD Million)
Table 183. South America Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Country (2027-2032) & (USD Million)
Table 184. Middle East & Africa Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Type (2021-2026) & (Tons)
Table 185. Middle East & Africa Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Type (2027-2032) & (Tons)
Table 186. Middle East & Africa Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Application (2021-2026) & (Tons)
Table 187. Middle East & Africa Water-Based Laminating Adhesives for Flexible

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Packaging Sales Quantity by Application (2027-2032) & (Tons)
Table 188. Middle East & Africa Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Country (2021-2026) & (Tons)
Table 189. Middle East & Africa Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity by Country (2027-2032) & (Tons)
Table 190. Middle East & Africa Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Country (2021-2026) & (USD Million)
Table 191. Middle East & Africa Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Country (2027-2032) & (USD Million)
Table 192. Water-Based Laminating Adhesives for Flexible Packaging Raw Material
Table 193. Key Manufacturers of Water-Based Laminating Adhesives for Flexible Packaging Raw Materials
Table 194. Water-Based Laminating Adhesives for Flexible Packaging Typical Distributors
Table 195. Water-Based Laminating Adhesives for Flexible Packaging Typical Customers

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List Of Figures

LIST OF FIGURES

Figure 1. Water-Based Laminating Adhesives for Flexible Packaging Picture
Figure 2. Global Water-Based Laminating Adhesives for Flexible Packaging Revenue by Type, (USD Million), 2021 & 2025 & 2032
Figure 3. Global Water-Based Laminating Adhesives for Flexible Packaging Revenue Market Share by Type in 2025
Figure 4. Acrylic Water-Based Laminating Adhesives Examples
Figure 5. Waterborne Polyurethane Laminating Adhesives Examples
Figure 6. Acrylic PUD Hybrid Laminating Adhesives Examples
Figure 7. Other Examples
Figure 8. Global Water-Based Laminating Adhesives for Flexible Packaging Revenue by Lamination Process, (USD Million), 2021 & 2025 & 2032
Figure 9. Global Water-Based Laminating Adhesives for Flexible Packaging Revenue Market Share by Lamination Process in 2025
Figure 10. Dry-Bond Lamination Adhesives Examples
Figure 11. Wet-Bond Lamination Adhesives Examples
Figure 12. Other Examples
Figure 13. Global Water-Based Laminating Adhesives for Flexible Packaging Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
Figure 14. Global Water-Based Laminating Adhesives for Flexible Packaging Revenue Market Share by Application in 2025
Figure 15. Dry Food and Snack Packaging Examples
Figure 16. Fresh Produce Packaging Examples
Figure 17. Coffee and Tea Packaging Examples
Figure 18. Dairy Product Packaging Examples
Figure 19. Prepared and Retort Food Packaging Examples
Figure 20. Sauces and Condiment Packaging Examples
Figure 21. Pet Food Packaging Examples
Figure 22. Pharmaceutical Product Packaging Examples
Figure 23. Pharmaceutical Product Packaging Examples
Figure 24. Global Water-Based Laminating Adhesives for Flexible Packaging Consumption Value, (USD Million): 2021 & 2025 & 2032
Figure 25. Global Water-Based Laminating Adhesives for Flexible Packaging Consumption Value and Forecast (2021-2032) & (USD Million)
Figure 26. Global Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity (2021-2032) & (Tons)

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Figure 27. Global Water-Based Laminating Adhesives for Flexible Packaging Price (2021-2032) & (US$/kg)
Figure 28. Global Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity Market Share by Manufacturer in 2025
Figure 29. Global Water-Based Laminating Adhesives for Flexible Packaging Revenue Market Share by Manufacturer in 2025
Figure 30. Producer Shipments of Water-Based Laminating Adhesives for Flexible Packaging by Manufacturer Sales ($MM) and Market Share (%): 2025
Figure 31. Top 3 Water-Based Laminating Adhesives for Flexible Packaging Manufacturer (Revenue) Market Share in 2025
Figure 32. Top 6 Water-Based Laminating Adhesives for Flexible Packaging Manufacturer (Revenue) Market Share in 2025
Figure 33. Global Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity Market Share by Region (2021-2032)
Figure 34. Global Water-Based Laminating Adhesives for Flexible Packaging Consumption Value Market Share by Region (2021-2032)
Figure 35. North America Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032) & (USD Million)
Figure 36. Europe Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032) & (USD Million)
Figure 37. Asia-Pacific Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032) & (USD Million)
Figure 38. South America Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032) & (USD Million)
Figure 39. Middle East & Africa Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032) & (USD Million)
Figure 40. Global Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity Market Share by Type (2021-2032)
Figure 41. Global Water-Based Laminating Adhesives for Flexible Packaging Consumption Value Market Share by Type (2021-2032)
Figure 42. Global Water-Based Laminating Adhesives for Flexible Packaging Average Price by Type (2021-2032) & (US$/kg)
Figure 43. Global Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity Market Share by Application (2021-2032)
Figure 44. Global Water-Based Laminating Adhesives for Flexible Packaging Revenue Market Share by Application (2021-2032)
Figure 45. Global Water-Based Laminating Adhesives for Flexible Packaging Average Price by Application (2021-2032) & (US$/kg)
Figure 46. North America Water-Based Laminating Adhesives for Flexible Packaging

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Sales Quantity Market Share by Type (2021-2032)
Figure 47. North America Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity Market Share by Application (2021-2032)
Figure 48. North America Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity Market Share by Country (2021-2032)
Figure 49. North America Water-Based Laminating Adhesives for Flexible Packaging Consumption Value Market Share by Country (2021-2032)
Figure 50. United States Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032) & (USD Million)
Figure 51. Canada Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032) & (USD Million)
Figure 52. Mexico Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032) & (USD Million)
Figure 53. Europe Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity Market Share by Type (2021-2032)
Figure 54. Europe Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity Market Share by Application (2021-2032)
Figure 55. Europe Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity Market Share by Country (2021-2032)
Figure 56. Europe Water-Based Laminating Adhesives for Flexible Packaging Consumption Value Market Share by Country (2021-2032)
Figure 57. Germany Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032) & (USD Million)
Figure 58. France Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032) & (USD Million)
Figure 59. United Kingdom Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032) & (USD Million)
Figure 60. Russia Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032) & (USD Million)
Figure 61. Italy Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032) & (USD Million)
Figure 62. Asia-Pacific Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity Market Share by Type (2021-2032)
Figure 63. Asia-Pacific Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity Market Share by Application (2021-2032)
Figure 64. Asia-Pacific Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity Market Share by Region (2021-2032)
Figure 65. Asia-Pacific Water-Based Laminating Adhesives for Flexible Packaging Consumption Value Market Share by Region (2021-2032)

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Figure 66. China Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032) & (USD Million)
Figure 67. Japan Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032) & (USD Million)
Figure 68. South Korea Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032) & (USD Million)
Figure 69. India Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032) & (USD Million)
Figure 70. Southeast Asia Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032) & (USD Million)
Figure 71. Australia Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032) & (USD Million)
Figure 72. South America Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity Market Share by Type (2021-2032)
Figure 73. South America Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity Market Share by Application (2021-2032)
Figure 74. South America Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity Market Share by Country (2021-2032)
Figure 75. South America Water-Based Laminating Adhesives for Flexible Packaging Consumption Value Market Share by Country (2021-2032)
Figure 76. Brazil Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032) & (USD Million)
Figure 77. Argentina Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032) & (USD Million)
Figure 78. Middle East & Africa Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity Market Share by Type (2021-2032)
Figure 79. Middle East & Africa Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity Market Share by Application (2021-2032)
Figure 80. Middle East & Africa Water-Based Laminating Adhesives for Flexible Packaging Sales Quantity Market Share by Country (2021-2032)
Figure 81. Middle East & Africa Water-Based Laminating Adhesives for Flexible Packaging Consumption Value Market Share by Country (2021-2032)
Figure 82. Turkey Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032) & (USD Million)
Figure 83. Egypt Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032) & (USD Million)
Figure 84. Saudi Arabia Water-Based Laminating Adhesives for Flexible Packaging Consumption Value (2021-2032) & (USD Million)

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