

# Global Waterborne Ink Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G50F57AEE1D9EN.html>

Date: January 2026

Pages: 136

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

ID: G50F57AEE1D9EN

## Abstracts

The global Waterborne Ink market size is expected to reach \$ 7853 million by 2032, rising at a market growth of 3.9% CAGR during the forecast period (2026-2032). Waterborne Ink refers to printing ink systems in which water is the primary carrier, used to deliver colorants and functional additives onto substrates through processes such as flexography, gravure, screen, and increasingly inkjet. It matters because it supports high-throughput packaging and commercial printing while helping printers and brand owners manage emissions and workplace exposure targets without depending on large volumes of organic solvents.

Upstream, Waterborne Ink supply is anchored in pigments and dispersions, polymer binders (commonly acrylic, styrene-acrylic, polyurethane, and selected natural polymer systems), plus surfactants, wetting agents, defoamers, waxes, crosslinkers, and biocides; performance is strongly governed by dispersion stability, film formation, and binder-substrate adhesion under real press conditions. Downstream demand is led by packaging converters and printers serving flexible packaging, corrugated, folding carton, and labels, alongside commercial print and textile or nonwoven printing, where qualification trials on press are typical before scale adoption. Procurement is commonly organized as annual or semi-annual supply frameworks with performance specifications, with supplementary spot buying for seasonal SKU changes, rapid artwork turnover, and short-notice production windows that require reliable local logistics.

In the current market, global production is around 539,000 tonnes, with an average selling price of about 10,920 USD per tonne EXW basis. Industry gross margin is estimated at about 25%, reflecting a blend of high-volume standard packaging grades and higher-margin, specification-driven formulations such as low-odor, low-migration, and performance-enhanced systems that require tighter raw-material control and more intensive application support. Market structure is moderately consolidated: the largest

multinational suppliers are estimated to control approximately 50 percent of global revenue (CR5), supported by global technical platforms and multinational converter relationships, while a long tail of regional manufacturers remains competitive due to short lead times, local service, and substrate- and press-specific customization. Representative product platforms include AQUALABEL, AQUACode, and HYDRO-X, while Chinese producers also commercialize waterborne gravure and flexo systems with series-level differentiation targeted at packaging converters.

From 2026 to 2032, Waterborne Ink growth is likely to be shaped less by a single regulation push and more by a set of operational tradeoffs that favor waterborne where total system cost and compliance risk can be reduced at the pressroom level. One driver is the rising opportunity cost of solvent handling and control, which can manifest as permitting burdens, abatement investments, insurance and safety requirements, and increasingly strict customer audits; where waterborne performance is acceptable, printers can simplify risk management and accelerate qualification cycles. A second driver is packaging redesign for circularity: shifts toward paper-based structures and mono-material concepts tend to increase the need for inks that are compatible with recycling and de-inking targets, pushing suppliers to refine resin design, additive selection, and odor and extractables control, especially for sensitive packaging.

Technically, the frontier is not only higher-performance waterborne gravure on films but also drying-energy efficiency and robustness at higher press speeds, where the limiting factor may be the converter's dryer capacity and energy price volatility rather than ink chemistry alone. Digitally, waterborne inkjet expansion is expected to continue where short runs, frequent design refreshes, and variable data requirements justify higher ink cost per unit, and where the overall value comes from reduced inventory risk and faster time-to-market. Key bottlenecks will likely center on (1) drying capacity and energy consumption at the converter, (2) maintaining rub, heat, and lamination performance on non-porous films without adding complexity that undermines recyclability goals, and (3) periodic tightness in pigment and specialty additive supply chains that can constrain higher-end dispersions and compliance-grade packages. Regionally, Asia—especially China—should remain a pivotal demand center due to the scale of packaging production, supporting both deep local supplier ecosystems and ongoing upgrades of waterborne product lines.

This report studies the global Waterborne Ink production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Waterborne Ink 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 Waterborne Ink that contribute to its increasing demand across many markets.

## Highlights and key features of the study

Global Waterborne Ink total production and demand, 2021-2032, (Kilotons)

Global Waterborne Ink total production value, 2021-2032, (USD Million)

Global Waterborne Ink production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Waterborne Ink consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Waterborne Ink domestic production, consumption, key domestic manufacturers and share

Global Waterborne Ink production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Waterborne Ink production by Print Process, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Waterborne Ink production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Waterborne Ink 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 DIC, Siegwerk, Flint Group, hubergroup, artience, SAKATA INX, Zeller+Gmelin, RUCOINX, Wikoff Color, Nazdar, 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 Waterborne Ink 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 Print Process, 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 Waterborne Ink Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Waterborne Ink Market, Segmentation by Print Process:

Flexographic Water Based Inks

Gravure Water Based Inks

Screen Water Based Inks

Inkjet Water Based Inks

Other Water Based Inks

Global Waterborne Ink Market, Segmentation by Binder System:

Acrylic Binder

Styrene Acrylic Binder

Polyurethane Binder

Natural Polymer Binder

Other Binder Systems

Global Waterborne Ink Market, Segmentation by Compliance Grade:

Food Contact Low Migration

General Packaging

Publication and Commercial

Textile and Specialty

Industrial Marking

Global Waterborne Ink Market, Segmentation by Application:

Flexible Packaging

Corrugated Packaging

Folding Carton

Labels

Publication and Commercial Print

Textiles and Nonwoven Printing

**Companies Profiled:**

DIC

Siegwerk

Flint Group

hubergroup

artience

SAKATA INX

Zeller+Gmelin

RUCOINX

Wikoff Color

Nazdar

Kao Collins

Fujifilm

Dainichiseika

Hanghua Ink

Tianlong

Yips Chemical

Letong Chemical

Shanghai Peony Ink

Shunfeng Ink

Shenzhen BIC

### **Key Questions Answered:**

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

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