

Global Alkyl Ketene Dimer Market Growth 2026-2032

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Abstracts

The global Alkyl Ketene Dimer market size is predicted to grow from US\$ 35.42 million in 2025 to US\$ 20.62 million in 2032; it is expected to grow at a CAGR of 2.3% from 2026 to 2032.

Alkyl ketene dimer (AKD) is a class of synthetic hydrophobic chemicals derived from long-chain fatty acids of vegetable oils and supplied in the form of pale-yellow waxy solids or emulsions. It is the most important fiber-reactive neutral sizing agent and upstream wax raw material in neutral/alkaline papermaking systems. Industrially, high-carbon fatty acids from vegetable oils are first converted into fatty acid chlorides by acyl-chlorination, and these are then dimerized under appropriate catalytic and temperature conditions to produce AKD wax. The wax is further emulsified with starch, cationic emulsifiers and protective colloids under high shear to form a stable AKD emulsion, which is used in the wet-end of the paper machine or in surface sizing operations. When AKD emulsion is added to the pulp slurry or surface-sizing solution and the sheet is dried and cured, AKD migrates and orients on the fiber surface and reacts by esterification with cellulose hydroxyl groups to form a stable hydrophobic alkyl layer. This markedly reduces the absorption of water and aqueous solutions by paper and paperboard (lowering the Cobb value), enhances water resistance, moisture resistance and resistance to liquid penetration, and at the same time improves printability and dimensional stability while reducing equipment corrosion and deposits associated with acidic sizing systems. As a result, AKD supports calcium-carbonate-filled neutral/alkaline papermaking processes and enables stable, long-lasting sizing performance in cultural papers, packaging boards and various specialty papers.

Alkyl ketene dimer (AKD) has evolved from a simple chemical raw material into a fundamental sizing technology in neutral/alkaline papermaking systems. Major producers (such as Kemira, Solenis, Arakawa, CHEMIPAZ and Aries) generally define AKD as a fiber-reactive neutral sizing agent: it is derived from long-chain fatty acids of

vegetable oils, converted into waxy AKD through acyl-chlorination and dimerization, and then emulsified into a cationic AKD emulsion. This emulsion is added at the wet end of the paper machine or during surface sizing and, after drying and curing, reacts with cellulose hydroxyl groups to form a stable hydrophobic alkyl layer on the fiber surface. Compared with conventional rosin-based acidic sizing, AKD can significantly reduce Cobb values and enhance the water resistance, moisture resistance and liquid-penetration resistance of paper and paperboard, while also improving printability and dimensional stability. It has thus become a key chemical underpinning calcium-carbonate-filled neutral and alkaline papermaking processes.

In terms of product and process configuration, the AKD industry has already shifted from simply 'selling wax' to system-level competition built around 'wax + emulsion + application solutions.' Chinese producers such as Tiancheng, Lansen, Tianan and Ludao, as well as Taiwan's GO YEN, all present on their websites complete product packages that combine AKD wax, high-solids emulsions, emulsifiers/stabilizers and sizing auxiliaries, emphasizing high purity, low acid value, pale-yellow flake or granular form, and excellent emulsion stability and paper-machine runnability. Kemira, Solenis and CHEMIPAZ go a step further by offering surface sizing agents, promoter resins and technical services, providing integrated solutions that cover both wet-end and surface treatment. This indicates that the focus of industry competition is shifting away from the unit price of a single chemical toward a set of composite process indicators such as 'purity and reaction efficiency,' 'emulsion stability and retention,' and 'suitability for high-speed machines and high-filler systems.'

From an industry-structure perspective, AKD is characterized by a multi-polar competitive landscape in which multinational chemical companies coexist with leading Asian local players, and China has become a critical production and export base. On the one hand, multinationals such as Kemira, Solenis, Arakawa, CHEMIPAZ and Aries possess mature product portfolios and global service networks, and they combine technological advantages with local raw materials and capacity by partnering with or investing in plants operated by firms such as Tiancheng and Wilmar in China. On the other hand, regional companies including Shandong Tiancheng, Wuxi Lansen, Shandong Tianan, Shandong Ludao and GO YEN leverage advantages in vegetable-oil resources, cost and scale to build large, export-oriented capacities in AKD wax and neutral-sizing emulsions. Driven by growing downstream demand for packaging board, food-contact paper and specialty papers, together with regulatory preferences for low-solvent, low-VOC sizing systems, the AKD industry is evolving along a trajectory of 'capacity moving eastward + product upgrading + solution-oriented competition.'

LP Information, Inc. (LPI) ' newest research report, the "Alkyl Ketene Dimer Industry Forecast" looks at past sales and reviews total world Alkyl Ketene Dimer sales in 2025, providing a comprehensive analysis by region and market sector of projected Alkyl Ketene Dimer sales for 2026 through 2032. With Alkyl Ketene Dimer sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Alkyl Ketene Dimer industry.

This Insight Report provides a comprehensive analysis of the global Alkyl Ketene Dimer landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Alkyl Ketene Dimer portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Alkyl Ketene Dimer market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Alkyl Ketene Dimer and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Alkyl Ketene Dimer.

This report presents a comprehensive overview, market shares, and growth opportunities of Alkyl Ketene Dimer market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

AKD wax solid (raw material)

AKD emulsion

Segmentation by Performance:

Internal sizing grade AKD

Surface sizing AKD

Other

Segmentation by Function:

AKD-1840

AKD-1865

AKD-1895

Liquid

Segmentation by Application:

Copper base Paper

Copy Paper

Archival Paper

Dictionary Paper

other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Shandong Tiancheng Chemical Co., Ltd.

Wuxi Lansen Chemicals Co., Ltd.

Shandong Tianan Chemical Co., Ltd.

Wilmar International Limited

Kemira Oyj

GO YEN CHEMICAL INDUSTRIAL CO., LTD. (GYC GROUP)

Solenis LLC

Arakawa Chemical Industries, Ltd.

CHEMIPAZ Corporation

Akkim Kimya Sanayi ve Ticaret A.?

GO YEN CHEMICAL INDUSTRIAL CO., LTD.

Aries Chemical, Inc.

Shandong Ludao Chemical Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Alkyl Ketene Dimer market?

What factors are driving Alkyl Ketene Dimer market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Alkyl Ketene Dimer market opportunities vary by end market size?

How does Alkyl Ketene Dimer break out by Type, by Application?

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