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Global Deinkable Packaging Printing Inks Market Growth 2026-2032

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Abstracts

The global Deinkable Packaging Printing Inks market size is predicted to grow from US$ 343 million in 2025 to US$ 719 million in 2032; it is expected to grow at a CAGR of 10.8% from 2026 to 2032.

Deinkable Packaging Printing Inks are formulated printing inks and dedicated ink-release coating systems designed to separate printed ink layers from packaging substrates during defined recycling processes. The product scope covers wash-off inks removed through water or heated caustic washing, release-layer-assisted systems that detach conventional ink layers through a soluble or peelable primer, and flotation-deinkable inks used in fibre-based packaging recycling. These products are developed for substrates such as PET and crystallizable PET films, polyethylene and polypropylene packaging films, paper and paperboard, and selected rigid plastic structures. Their primary function is to reduce color, adhesive and coating contamination in recycled material, supporting higher-quality recycled plastic flakes, pellets and recovered fibres. Major applications include shrink sleeve labels, flexible film packages and refill pouches, folding cartons and paperboard packages, and directly printed rigid plastic containers.

Key Findings

Global sales volume reached approximately 52,000 Tons in 2025

The 2025 average selling price was approximately US$6.75 per kg

Shrink sleeve labels represented approximately one third of global demand

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Europe remained the largest regional market and standard-setting center

Commercial demand is shifting from recycling compatibility toward verified ink removal

Market Trends

The Deinkable Packaging Printing Inks market is moving from isolated recyclable-packaging projects toward integrated design-for-recycling systems in which ink, primer, adhesive, substrate and washing conditions are developed and qualified together. Direct wash-off inks remain central to PET shrink sleeve applications, while release-layer-assisted technologies are expanding into mono-material flexible packaging, refill pouches and rigid transparent plastics. Fibre-based packaging is also developing a more distinct deinking route as industry protocols increasingly separate conventional repulping, flotation deinking and specialised recycling processes. The 4evergreen protocol now evaluates fibre-based packaging through three dedicated recycling pathways, while INGEDE introduced Method 11-2 specifically for packaging deinkability in March 2025. Plastic packaging standards are also becoming more performance-based: the EU Packaging and Packaging Waste Regulation introduces recyclability performance grades from 2030 and recycled-at-scale requirements from 2035, while APR recognition increasingly supports regulatory and commercial qualification in North America. These changes are encouraging suppliers to offer validated packaging systems rather than generic inks carrying broad sustainability claims.

Market Dynamics

Drivers

Growth is primarily driven by the need to improve the quality and commercial value of recycled polymers and recovered fibres. Conventional printing layers can discolor recycled PET, PE and PP or restrict the use of recovered resin in transparent and high-value applications. Washable inks and deinking coatings allow converters and brand owners to retain graphic performance while reducing contamination during recycling. Regulation is reinforcing this economic incentive: California requires relevant plastic packaging to comply with the APR Design Guide to use recyclable labeling from October 4, 2026, and harder-to-recycle designs face higher producer-responsibility fees from January 2027. In Europe, recyclability grades and extended producer responsibility are increasingly linking packaging design decisions with future market access and waste-management costs.

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Restraints

Market development is constrained by the higher formulation, testing and qualification costs of specialist deinkable products. Ink removal performance depends on the substrate, printing method, curing technology, color coverage, primer, adhesive and actual washing process, meaning that a formulation validated for crystallizable PET cannot automatically be transferred to polyethylene film or paperboard. Packaging converters may also need to adjust drying, curing, lamination and color-management conditions, creating switching costs and limiting rapid replacement of established ink systems. The requirement to preserve adhesion, abrasion resistance, food-packaging safety and print speed before recycling, while also enabling controlled separation after use, remains a difficult technical balance.

Opportunities

The strongest opportunities are emerging in flexible packaging structures where high-quality mechanical recycling has traditionally been limited by printing inks and multilayer adhesives. Deinking coatings combined with peelable laminating adhesives are creating new routes for mono-material and multilayer film recovery, including household-care refill pouches and transparent rigid plastic packaging. Additional opportunities are developing in paperboard packaging as flotation-deinking protocols become more packaging-specific, and in digital packaging where shorter production runs make certified specialty consumables commercially viable. Asian markets also offer localization potential as global brand owners extend common recyclability specifications to regional packaging suppliers and local ink manufacturing networks.

Challenges

The main industry challenge is the absence of one universal definition of deinkability across all packaging materials. PET bottle washing, polyolefin film recycling and fibre flotation use different temperatures, chemicals, mechanical actions and acceptance criteria. A solution may be classified as washable, floatable, peelable or recycling-compatible depending on the packaging structure, even when the underlying commercial objective is similar. Suppliers must therefore avoid treating laboratory ink removal as equivalent to complete package recyclability. Maintaining transparent and comparable claims will require closer alignment among ink manufacturers, converters, recyclers, brand owners and standards organizations, alongside more industrial-scale validation of recovered material quality.

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Industry Chain Analysis

The upstream industry includes pigments, binders, polyurethane and acrylic resins, waterborne and solvent carriers, photoinitiators, waxes, dispersants and functional additives. In release-layer-assisted systems, specialised primers, overprint varnishes and peelable laminating adhesives form an additional upstream materials layer. Raw-material selection determines ink adhesion, curing, color strength, wash-off response and compatibility with food-contact or low-migration requirements, making formulation control more important than simple commodity input costs.

The midstream consists of printing ink and coating formulators, regional manufacturing plants, color-matching centers and technical service laboratories. Value is created through formulation expertise, application testing, substrate-specific qualification and collaboration with converters and recyclers. Downstream participants include label printers, flexible packaging converters, folding-carton producers, rigid plastic decorators, consumer brands, collection systems and recycling operators. The highest-value suppliers are increasingly those able to deliver an integrated package combining ink, primer, adhesive guidance, recycling validation and local technical support rather than a standalone ink product.

Segment Insights

Wash-off Deinkable Inks remain the largest product segment, supported by relatively mature use in crystallizable PET shrink sleeves and established caustic-wash testing methods. Release-layer-assisted Deinkable Systems represent the most active technology expansion area because they allow existing color inks to be removed through a dedicated primer or coating. Their addressable market extends beyond labels into flexible film packaging and rigid plastic applications. Flotation-deinkable Fibre Packaging Inks form a separate technical segment whose growth depends on the availability of mills using flotation and on the assignment of packaging to the correct fibre-recycling stream.

By application, Shrink Sleeve Labels accounted for approximately one third of 2025 market demand and remained the largest verified commercial use. Flexible Film Packages formed the second-largest application and are expected to gain structural share as mono-material PE and PP packaging, refill pouches and film-to-film recycling projects expand. Folding Cartons and Paperboard Packages provide a broad but more selective opportunity because not all fibre packaging enters a flotation-deinking process. Direct-printed Rigid Plastic Packages and digital packaging consumables remain

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smaller segments but offer higher average selling prices and attractive specialization opportunities.

Downstream Market Opportunities

Beverage and dairy packaging provide the most established opportunity through washable shrink sleeves that support cleaner PET recycling. Household care and personal care are becoming important growth areas because refill pouches use large printed surfaces and brand owners increasingly seek closed-loop material solutions. Food, pharmaceutical and cosmetics folding cartons create demand for deinkable UV and offset systems that maintain product safety and graphic quality. Transparent cosmetic packaging, plastic cups, lids and other directly printed rigid containers offer an emerging opportunity where successful ink removal can materially expand the end-use options and value of recovered resin. Commercial pouch-recycling projects in Japan indicate that deinking and delamination technologies are beginning to move beyond laboratory demonstration into limited product deployment.

Regional Insights

Europe remains the largest market and the principal center for technical standards, supported by a dense concentration of packaging ink suppliers, recyclers and industry initiatives. The EU Packaging and Packaging Waste Regulation, 4evergreen protocols and INGEDE packaging methods are creating a clearer qualification framework for plastic and fibre-based packaging. European demand is comparatively diversified across shrink sleeves, flexible packaging, folding cartons and paperboard, while customers place strong emphasis on documented recycling performance and compliance.

North America is led by PET bottle and label recyclability requirements, with APR testing and recognition providing a strong commercial pathway for washable ink and primer systems. Asia offers the largest long-term volume opportunity as Japan-based ink groups expand commercial recycling systems and China, India and Southeast Asia increase flexible packaging and label production. Japan currently leads regional technology development, while China has growing application and manufacturing capability but fewer independently validated domestic product series. Regional growth will depend on whether common global brand specifications are supported by local recycling infrastructure and locally qualified ink production.

Competitive Landscape Analysis

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The competitive landscape is concentrated around a limited group of global packaging ink companies and specialist coating suppliers, but it is not a conventional commodity-ink market. Large multinational groups compete through broad formulation portfolios, global manufacturing networks, converter relationships and the ability to qualify products across multiple substrates and jurisdictions. DIC and SAKATA INX have established direct washable ink positions in shrink sleeve applications, while Siegwerk combines deinkable inks with primers and delamination expertise for flexible packaging. artience competes through an integrated ink, deinking-coating and peelable-adhesive system, and specialist suppliers such as Flint Group Packaging Solutions and ACTEGA focus on release primers and coating technologies. hubergroup, Zeller+Gmelin and HANGZHOU TOKA INK extend competition into UV, paperboard and regional manufacturing applications, while HP Indigo addresses the digital packaging consumables segment. Competitive advantage increasingly depends on verified package-level performance, access to recycling trials, local technical service and the ability to avoid duplicate qualification work across customers. No single supplier currently possesses a uniform advantage across PET, polyolefin films, fibre packaging, rigid plastics and digital printing, leaving the market open to technology partnerships and application-specific specialists.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Deinkable Packaging Printing Inks 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 Deinkable Packaging Printing Inks portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Deinkable Packaging Printing Inks market.

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This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Deinkable Packaging Printing Inks 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 Deinkable Packaging Printing Inks.

This report presents a comprehensive overview, market shares, and growth opportunities of Deinkable Packaging Printing Inks market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Wash-off Deinkable Inks

Release-layer-assisted Deinkable Systems

Flotation-deinkable Fibre Packaging Inks

Other

Segmentation by Substrate Material:

Polyester-based Substrates

Polyolefin-based Substrates

Fibre-based Substrates

Other Polymer Substrates

Other

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Segmentation by Application:

Shrink Sleeve Labels

Flexible Film Packages

Folding Cartons and Paperboard Packages

Direct-printed Rigid Plastic Packages

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

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- 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.

- DIC Corporation
- SAKATA INX CORPORATION
- Siegwerk Druckfarben AG & Co. KGaA
- hubergroup Deutschland GmbH
- Zeller+Gmelin GmbH & Co. KG

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artience Co., Ltd.

HANGZHOU TOKA INK CO., LTD.

HP Indigo Ltd.

Flint Group Packaging Solutions

ACTEGA GmbH

Key Questions Addressed in this Report

What is the 10-year outlook for the global Deinkable Packaging Printing Inks market?

What factors are driving Deinkable Packaging Printing Inks market growth, globally and by region?

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

How do Deinkable Packaging Printing Inks market opportunities vary by end market size?

How does Deinkable Packaging Printing Inks break out by Type, by Application?

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Contents

1 SCOPE OF THE REPORT

1.1 Market Introduction
1.2 Years Considered
1.3 Research Objectives
1.4 Market Research Methodology
1.5 Research Process and Data Source
1.6 Economic Indicators
1.7 Currency Considered
1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview
  2.1.1 Global Deinkable Packaging Printing Inks Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for Deinkable Packaging Printing Inks by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for Deinkable Packaging Printing Inks by Country/Region, 2021, 2025 & 2032
2.2 Deinkable Packaging Printing Inks Segment by Type
  2.2.1 Wash-off Deinkable Inks
  2.2.2 Release-layer-assisted Deinkable Systems
  2.2.3 Flotation-deinkable Fibre Packaging Inks
  2.2.4 Other
  2.2.5 Deinkable Packaging Printing Inks Sales by Type
    2.2.5.1 Global Deinkable Packaging Printing Inks Sales Market Share by Type (2021-2026)
    2.2.5.2 Global Deinkable Packaging Printing Inks Revenue and Market Share by Type (2021-2026)
    2.2.5.3 Global Deinkable Packaging Printing Inks Sale Price by Type (2021-2026)
2.3 Deinkable Packaging Printing Inks Segment by Substrate Material
  2.3.1 Polyester-based Substrates
  2.3.2 Polyolefin-based Substrates
  2.3.3 Fibre-based Substrates
  2.3.4 Other Polymer Substrates
  2.3.5 Other
  2.3.6 Deinkable Packaging Printing Inks Sales by Substrate Material

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2.3.6.1 Global Deinkable Packaging Printing Inks Sales Market Share by Substrate Material (2021-2026)
2.3.6.2 Global Deinkable Packaging Printing Inks Revenue and Market Share by Substrate Material (2021-2026)
2.3.6.3 Global Deinkable Packaging Printing Inks Sale Price by Substrate Material (2021-2026)
2.4 Deinkable Packaging Printing Inks Segment by Application
2.4.1 Shrink Sleeve Labels
2.4.2 Flexible Film Packages
2.4.3 Folding Cartons and Paperboard Packages
2.4.4 Direct-printed Rigid Plastic Packages
2.4.5 Other
2.4.6 Deinkable Packaging Printing Inks Sales by Application
2.4.6.1 Global Deinkable Packaging Printing Inks Sale Market Share by Application (2021-2026)
2.4.6.2 Global Deinkable Packaging Printing Inks Revenue and Market Share by Application (2021-2026)
2.4.6.3 Global Deinkable Packaging Printing Inks Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Deinkable Packaging Printing Inks Breakdown Data by Company
3.1.1 Global Deinkable Packaging Printing Inks Annual Sales by Company (2021-2026)
3.1.2 Global Deinkable Packaging Printing Inks Sales Market Share by Company (2021-2026)
3.2 Global Deinkable Packaging Printing Inks Annual Revenue by Company (2021-2026)
3.2.1 Global Deinkable Packaging Printing Inks Revenue by Company (2021-2026)
3.2.2 Global Deinkable Packaging Printing Inks Revenue Market Share by Company (2021-2026)
3.3 Global Deinkable Packaging Printing Inks Sale Price by Company
3.4 Key Manufacturers Deinkable Packaging Printing Inks Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers Deinkable Packaging Printing Inks Product Location Distribution
3.4.2 Players Deinkable Packaging Printing Inks Products Offered
3.5 Market Concentration Rate Analysis

+357 96 030922
info@marketpublishers.com

3.5.1 Competition Landscape Analysis
3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
3.6 New Products and Potential Entrants
3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR DEINKABLE PACKAGING PRINTING INKS BY GEOGRAPHIC REGION

4.1 World Historic Deinkable Packaging Printing Inks Market Size by Geographic Region (2021-2026)
4.1.1 Global Deinkable Packaging Printing Inks Annual Sales by Geographic Region (2021-2026)
4.1.2 Global Deinkable Packaging Printing Inks Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic Deinkable Packaging Printing Inks Market Size by Country/Region (2021-2026)
4.2.1 Global Deinkable Packaging Printing Inks Annual Sales by Country/Region (2021-2026)
4.2.2 Global Deinkable Packaging Printing Inks Annual Revenue by Country/Region (2021-2026)
4.3 Americas Deinkable Packaging Printing Inks Sales Growth
4.4 APAC Deinkable Packaging Printing Inks Sales Growth
4.5 Europe Deinkable Packaging Printing Inks Sales Growth
4.6 Middle East & Africa Deinkable Packaging Printing Inks Sales Growth

5 AMERICAS

5.1 Americas Deinkable Packaging Printing Inks Sales by Country
5.1.1 Americas Deinkable Packaging Printing Inks Sales by Country (2021-2026)
5.1.2 Americas Deinkable Packaging Printing Inks Revenue by Country (2021-2026)
5.2 Americas Deinkable Packaging Printing Inks Sales by Type (2021-2026)
5.3 Americas Deinkable Packaging Printing Inks Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

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6.1 APAC Deinkable Packaging Printing Inks Sales by Region
6.1.1 APAC Deinkable Packaging Printing Inks Sales by Region (2021-2026)
6.1.2 APAC Deinkable Packaging Printing Inks Revenue by Region (2021-2026)
6.2 APAC Deinkable Packaging Printing Inks Sales by Type (2021-2026)
6.3 APAC Deinkable Packaging Printing Inks Sales by Application (2021-2026)
6.4 China
6.5 Japan
6.6 South Korea
6.7 Southeast Asia
6.8 India
6.9 Australia
6.10 China Taiwan

7 EUROPE

7.1 Europe Deinkable Packaging Printing Inks by Country
7.1.1 Europe Deinkable Packaging Printing Inks Sales by Country (2021-2026)
7.1.2 Europe Deinkable Packaging Printing Inks Revenue by Country (2021-2026)
7.2 Europe Deinkable Packaging Printing Inks Sales by Type (2021-2026)
7.3 Europe Deinkable Packaging Printing Inks Sales by Application (2021-2026)
7.4 Germany
7.5 France
7.6 UK
7.7 Italy
7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Deinkable Packaging Printing Inks by Country
8.1.1 Middle East & Africa Deinkable Packaging Printing Inks Sales by Country (2021-2026)
8.1.2 Middle East & Africa Deinkable Packaging Printing Inks Revenue by Country (2021-2026)
8.2 Middle East & Africa Deinkable Packaging Printing Inks Sales by Type (2021-2026)
8.3 Middle East & Africa Deinkable Packaging Printing Inks Sales by Application (2021-2026)
8.4 Egypt
8.5 South Africa
8.6 Israel

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8.7 Turkey
8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities
9.2 Market Challenges & Risks
9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of Deinkable Packaging Printing Inks
10.3 Manufacturing Process Analysis of Deinkable Packaging Printing Inks
10.4 Industry Chain Structure of Deinkable Packaging Printing Inks

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
  11.1.1 Direct Channels
  11.1.2 Indirect Channels
11.2 Deinkable Packaging Printing Inks Distributors
11.3 Deinkable Packaging Printing Inks Customer

12 WORLD FORECAST REVIEW FOR DEINKABLE PACKAGING PRINTING INKS BY GEOGRAPHIC REGION

12.1 Global Deinkable Packaging Printing Inks Market Size Forecast by Region
  12.1.1 Global Deinkable Packaging Printing Inks Forecast by Region (2027-2032)
  12.1.2 Global Deinkable Packaging Printing Inks Annual Revenue Forecast by Region (2027-2032)
12.2 Americas Forecast by Country (2027-2032)
12.3 APAC Forecast by Region (2027-2032)
12.4 Europe Forecast by Country (2027-2032)
12.5 Middle East & Africa Forecast by Country (2027-2032)
12.6 Global Deinkable Packaging Printing Inks Forecast by Type (2027-2032)
12.7 Global Deinkable Packaging Printing Inks Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

+357 96 030922
info@marketpublishers.com

13.1 DIC Corporation
13.1.1 DIC Corporation Company Information
13.1.2 DIC Corporation Deinkable Packaging Printing Inks Product Portfolios and Specifications
13.1.3 DIC Corporation Deinkable Packaging Printing Inks Sales, Revenue, Price and Gross Margin (2021-2026)
13.1.4 DIC Corporation Main Business Overview
13.1.5 DIC Corporation Latest Developments
13.2 SAKATA INX CORPORATION
13.2.1 SAKATA INX CORPORATION Company Information
13.2.2 SAKATA INX CORPORATION Deinkable Packaging Printing Inks Product Portfolios and Specifications
13.2.3 SAKATA INX CORPORATION Deinkable Packaging Printing Inks Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 SAKATA INX CORPORATION Main Business Overview
13.2.5 SAKATA INX CORPORATION Latest Developments
13.3 Siegwerk Druckfarben AG & Co. KGaA
13.3.1 Siegwerk Druckfarben AG & Co. KGaA Company Information
13.3.2 Siegwerk Druckfarben AG & Co. KGaA Deinkable Packaging Printing Inks Product Portfolios and Specifications
13.3.3 Siegwerk Druckfarben AG & Co. KGaA Deinkable Packaging Printing Inks Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 Siegwerk Druckfarben AG & Co. KGaA Main Business Overview
13.3.5 Siegwerk Druckfarben AG & Co. KGaA Latest Developments
13.4 hubergroup Deutschland GmbH
13.4.1 hubergroup Deutschland GmbH Company Information
13.4.2 hubergroup Deutschland GmbH Deinkable Packaging Printing Inks Product Portfolios and Specifications
13.4.3 hubergroup Deutschland GmbH Deinkable Packaging Printing Inks Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 hubergroup Deutschland GmbH Main Business Overview
13.4.5 hubergroup Deutschland GmbH Latest Developments
13.5 Zeller+Gmelin GmbH & Co. KG
13.5.1 Zeller+Gmelin GmbH & Co. KG Company Information
13.5.2 Zeller+Gmelin GmbH & Co. KG Deinkable Packaging Printing Inks Product Portfolios and Specifications
13.5.3 Zeller+Gmelin GmbH & Co. KG Deinkable Packaging Printing Inks Sales, Revenue, Price and Gross Margin (2021-2026)

+357 96 030922
info@marketpublishers.com

13.5.4 Zeller+Gmelin GmbH & Co. KG Main Business Overview
13.5.5 Zeller+Gmelin GmbH & Co. KG Latest Developments
13.6 artience Co., Ltd.
13.6.1 artience Co., Ltd. Company Information
13.6.2 artience Co., Ltd. Deinkable Packaging Printing Inks Product Portfolios and Specifications
13.6.3 artience Co., Ltd. Deinkable Packaging Printing Inks Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 artience Co., Ltd. Main Business Overview
13.6.5 artience Co., Ltd. Latest Developments
13.7 HANGZHOU TOKA INK CO., LTD.
13.7.1 HANGZHOU TOKA INK CO., LTD. Company Information
13.7.2 HANGZHOU TOKA INK CO., LTD. Deinkable Packaging Printing Inks Product Portfolios and Specifications
13.7.3 HANGZHOU TOKA INK CO., LTD. Deinkable Packaging Printing Inks Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 HANGZHOU TOKA INK CO., LTD. Main Business Overview
13.7.5 HANGZHOU TOKA INK CO., LTD. Latest Developments
13.8 HP Indigo Ltd.
13.8.1 HP Indigo Ltd. Company Information
13.8.2 HP Indigo Ltd. Deinkable Packaging Printing Inks Product Portfolios and Specifications
13.8.3 HP Indigo Ltd. Deinkable Packaging Printing Inks Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 HP Indigo Ltd. Main Business Overview
13.8.5 HP Indigo Ltd. Latest Developments
13.9 Flint Group Packaging Solutions
13.9.1 Flint Group Packaging Solutions Company Information
13.9.2 Flint Group Packaging Solutions Deinkable Packaging Printing Inks Product Portfolios and Specifications
13.9.3 Flint Group Packaging Solutions Deinkable Packaging Printing Inks Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 Flint Group Packaging Solutions Main Business Overview
13.9.5 Flint Group Packaging Solutions Latest Developments
13.10 ACTEGA GmbH
13.10.1 ACTEGA GmbH Company Information
13.10.2 ACTEGA GmbH Deinkable Packaging Printing Inks Product Portfolios and Specifications
13.10.3 ACTEGA GmbH Deinkable Packaging Printing Inks Sales, Revenue, Price

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and Gross Margin (2021-2026)
13.10.4 ACTEGA GmbH Main Business Overview
13.10.5 ACTEGA GmbH Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

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List Of Tables

LIST OF TABLES

Table 1. Deinkable Packaging Printing Inks Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. Deinkable Packaging Printing Inks Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of Wash-off Deinkable Inks
Table 4. Major Players of Release-layer-assisted Deinkable Systems
Table 5. Major Players of Flotation-deinkable Fibre Packaging Inks
Table 6. Major Players of Other
Table 7. Global Deinkable Packaging Printing Inks Sales by Type (2021-2026) & (Tons)
Table 8. Global Deinkable Packaging Printing Inks Sales Market Share by Type (2021-2026)
Table 9. Global Deinkable Packaging Printing Inks Revenue by Type (2021-2026) & ($ million)
Table 10. Global Deinkable Packaging Printing Inks Revenue Market Share by Type (2021-2026)
Table 11. Global Deinkable Packaging Printing Inks Sale Price by Type (2021-2026) & (US$/kg)
Table 12. Major Players of Polyester-based Substrates
Table 13. Major Players of Polyolefin-based Substrates
Table 14. Major Players of Fibre-based Substrates
Table 15. Major Players of Other Polymer Substrates
Table 16. Major Players of Other
Table 17. Global Deinkable Packaging Printing Inks Sales by Substrate Material (2021-2026) & (Tons)
Table 18. Global Deinkable Packaging Printing Inks Sales Market Share by Substrate Material (2021-2026)
Table 19. Global Deinkable Packaging Printing Inks Revenue by Substrate Material (2021-2026) & ($ million)
Table 20. Global Deinkable Packaging Printing Inks Revenue Market Share by Substrate Material (2021-2026)
Table 21. Global Deinkable Packaging Printing Inks Sale Price by Substrate Material (2021-2026) & (US$/kg)
Table 22. Global Deinkable Packaging Printing Inks Sale by Application (2021-2026) & (Tons)
Table 23. Global Deinkable Packaging Printing Inks Sale Market Share by Application

+357 96 030922
info@marketpublishers.com

(2021-2026)
Table 24. Global Deinkable Packaging Printing Inks Revenue by Application (2021-2026) & ($ million)
Table 25. Global Deinkable Packaging Printing Inks Revenue Market Share by Application (2021-2026)
Table 26. Global Deinkable Packaging Printing Inks Sale Price by Application (2021-2026) & (US$/kg)
Table 27. Global Deinkable Packaging Printing Inks Sales by Company (2021-2026) & (Tons)
Table 28. Global Deinkable Packaging Printing Inks Sales Market Share by Company (2021-2026)
Table 29. Global Deinkable Packaging Printing Inks Revenue by Company (2021-2026) & ($ millions)
Table 30. Global Deinkable Packaging Printing Inks Revenue Market Share by Company (2021-2026)
Table 31. Global Deinkable Packaging Printing Inks Sale Price by Company (2021-2026) & (US$/kg)
Table 32. Key Manufacturers Deinkable Packaging Printing Inks Producing Area Distribution and Sales Area
Table 33. Players Deinkable Packaging Printing Inks Products Offered
Table 34. Deinkable Packaging Printing Inks Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 35. New Products and Potential Entrants
Table 36. Market M&A Activity & Strategy
Table 37. Global Deinkable Packaging Printing Inks Sales by Geographic Region (2021-2026) & (Tons)
Table 38. Global Deinkable Packaging Printing Inks Sales Market Share Geographic Region (2021-2026)
Table 39. Global Deinkable Packaging Printing Inks Revenue by Geographic Region (2021-2026) & ($ millions)
Table 40. Global Deinkable Packaging Printing Inks Revenue Market Share by Geographic Region (2021-2026)
Table 41. Global Deinkable Packaging Printing Inks Sales by Country/Region (2021-2026) & (Tons)
Table 42. Global Deinkable Packaging Printing Inks Sales Market Share by Country/Region (2021-2026)
Table 43. Global Deinkable Packaging Printing Inks Revenue by Country/Region (2021-2026) & ($ millions)
Table 44. Global Deinkable Packaging Printing Inks Revenue Market Share by

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Country/Region (2021-2026)
Table 45. Americas Deinkable Packaging Printing Inks Sales by Country (2021-2026) & (Tons)
Table 46. Americas Deinkable Packaging Printing Inks Sales Market Share by Country (2021-2026)
Table 47. Americas Deinkable Packaging Printing Inks Revenue by Country (2021-2026) & ($ millions)
Table 48. Americas Deinkable Packaging Printing Inks Sales by Type (2021-2026) & (Tons)
Table 49. Americas Deinkable Packaging Printing Inks Sales by Application (2021-2026) & (Tons)
Table 50. APAC Deinkable Packaging Printing Inks Sales by Region (2021-2026) & (Tons)
Table 51. APAC Deinkable Packaging Printing Inks Sales Market Share by Region (2021-2026)
Table 52. APAC Deinkable Packaging Printing Inks Revenue by Region (2021-2026) & ($ millions)
Table 53. APAC Deinkable Packaging Printing Inks Sales by Type (2021-2026) & (Tons)
Table 54. APAC Deinkable Packaging Printing Inks Sales by Application (2021-2026) & (Tons)
Table 55. Europe Deinkable Packaging Printing Inks Sales by Country (2021-2026) & (Tons)
Table 56. Europe Deinkable Packaging Printing Inks Revenue by Country (2021-2026) & ($ millions)
Table 57. Europe Deinkable Packaging Printing Inks Sales by Type (2021-2026) & (Tons)
Table 58. Europe Deinkable Packaging Printing Inks Sales by Application (2021-2026) & (Tons)
Table 59. Middle East & Africa Deinkable Packaging Printing Inks Sales by Country (2021-2026) & (Tons)
Table 60. Middle East & Africa Deinkable Packaging Printing Inks Revenue Market Share by Country (2021-2026)
Table 61. Middle East & Africa Deinkable Packaging Printing Inks Sales by Type (2021-2026) & (Tons)
Table 62. Middle East & Africa Deinkable Packaging Printing Inks Sales by Application (2021-2026) & (Tons)
Table 63. Key Market Drivers & Growth Opportunities of Deinkable Packaging Printing Inks

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Table 64. Key Market Challenges & Risks of Deinkable Packaging Printing Inks
Table 65. Key Industry Trends of Deinkable Packaging Printing Inks
Table 66. Deinkable Packaging Printing Inks Raw Material
Table 67. Key Suppliers of Raw Materials
Table 68. Deinkable Packaging Printing Inks Distributors List
Table 69. Deinkable Packaging Printing Inks Customer List
Table 70. Global Deinkable Packaging Printing Inks Sales Forecast by Region (2027-2032) & (Tons)
Table 71. Global Deinkable Packaging Printing Inks Revenue Forecast by Region (2027-2032) & ($ millions)
Table 72. Americas Deinkable Packaging Printing Inks Sales Forecast by Country (2027-2032) & (Tons)
Table 73. Americas Deinkable Packaging Printing Inks Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 74. APAC Deinkable Packaging Printing Inks Sales Forecast by Region (2027-2032) & (Tons)
Table 75. APAC Deinkable Packaging Printing Inks Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 76. Europe Deinkable Packaging Printing Inks Sales Forecast by Country (2027-2032) & (Tons)
Table 77. Europe Deinkable Packaging Printing Inks Revenue Forecast by Country (2027-2032) & ($ millions)
Table 78. Middle East & Africa Deinkable Packaging Printing Inks Sales Forecast by Country (2027-2032) & (Tons)
Table 79. Middle East & Africa Deinkable Packaging Printing Inks Revenue Forecast by Country (2027-2032) & ($ millions)
Table 80. Global Deinkable Packaging Printing Inks Sales Forecast by Type (2027-2032) & (Tons)
Table 81. Global Deinkable Packaging Printing Inks Revenue Forecast by Type (2027-2032) & ($ millions)
Table 82. Global Deinkable Packaging Printing Inks Sales Forecast by Application (2027-2032) & (Tons)
Table 83. Global Deinkable Packaging Printing Inks Revenue Forecast by Application (2027-2032) & ($ millions)
Table 84. DIC Corporation Basic Information, Deinkable Packaging Printing Inks Manufacturing Base, Sales Area and Its Competitors
Table 85. DIC Corporation Deinkable Packaging Printing Inks Product Portfolios and Specifications
Table 86. DIC Corporation Deinkable Packaging Printing Inks Sales (Tons), Revenue ($

Million), Price (US$/kg) and Gross Margin (2021-2026)
Table 87. DIC Corporation Main Business
Table 88. DIC Corporation Latest Developments
Table 89. SAKATA INX CORPORATION Basic Information, Deinkable Packaging Printing Inks Manufacturing Base, Sales Area and Its Competitors
Table 90. SAKATA INX CORPORATION Deinkable Packaging Printing Inks Product Portfolios and Specifications
Table 91. SAKATA INX CORPORATION Deinkable Packaging Printing Inks Sales (Tons), Revenue ($ Million), Price (US$/kg) and Gross Margin (2021-2026)
Table 92. SAKATA INX CORPORATION Main Business
Table 93. SAKATA INX CORPORATION Latest Developments
Table 94. Siegwerk Druckfarben AG & Co. KGaA Basic Information, Deinkable Packaging Printing Inks Manufacturing Base, Sales Area and Its Competitors
Table 95. Siegwerk Druckfarben AG & Co. KGaA Deinkable Packaging Printing Inks Product Portfolios and Specifications
Table 96. Siegwerk Druckfarben AG & Co. KGaA Deinkable Packaging Printing Inks Sales (Tons), Revenue ($ Million), Price (US$/kg) and Gross Margin (2021-2026)
Table 97. Siegwerk Druckfarben AG & Co. KGaA Main Business
Table 98. Siegwerk Druckfarben AG & Co. KGaA Latest Developments
Table 99. hubergroup Deutschland GmbH Basic Information, Deinkable Packaging Printing Inks Manufacturing Base, Sales Area and Its Competitors
Table 100. hubergroup Deutschland GmbH Deinkable Packaging Printing Inks Product Portfolios and Specifications
Table 101. hubergroup Deutschland GmbH Deinkable Packaging Printing Inks Sales (Tons), Revenue ($ Million), Price (US$/kg) and Gross Margin (2021-2026)
Table 102. hubergroup Deutschland GmbH Main Business
Table 103. hubergroup Deutschland GmbH Latest Developments
Table 104. Zeller+Gmelin GmbH & Co. KG Basic Information, Deinkable Packaging Printing Inks Manufacturing Base, Sales Area and Its Competitors
Table 105. Zeller+Gmelin GmbH & Co. KG Deinkable Packaging Printing Inks Product Portfolios and Specifications
Table 106. Zeller+Gmelin GmbH & Co. KG Deinkable Packaging Printing Inks Sales (Tons), Revenue ($ Million), Price (US$/kg) and Gross Margin (2021-2026)
Table 107. Zeller+Gmelin GmbH & Co. KG Main Business
Table 108. Zeller+Gmelin GmbH & Co. KG Latest Developments
Table 109. artience Co., Ltd. Basic Information, Deinkable Packaging Printing Inks Manufacturing Base, Sales Area and Its Competitors
Table 110. artience Co., Ltd. Deinkable Packaging Printing Inks Product Portfolios and Specifications

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Table 111. artience Co., Ltd. Deinkable Packaging Printing Inks Sales (Tons), Revenue ($ Million), Price (US$/kg) and Gross Margin (2021-2026)
Table 112. artience Co., Ltd. Main Business
Table 113. artience Co., Ltd. Latest Developments
Table 114. HANGZHOU TOKA INK CO., LTD. Basic Information, Deinkable Packaging Printing Inks Manufacturing Base, Sales Area and Its Competitors
Table 115. HANGZHOU TOKA INK CO., LTD. Deinkable Packaging Printing Inks Product Portfolios and Specifications
Table 116. HANGZHOU TOKA INK CO., LTD. Deinkable Packaging Printing Inks Sales (Tons), Revenue ($ Million), Price (US$/kg) and Gross Margin (2021-2026)
Table 117. HANGZHOU TOKA INK CO., LTD. Main Business
Table 118. HANGZHOU TOKA INK CO., LTD. Latest Developments
Table 119. HP Indigo Ltd. Basic Information, Deinkable Packaging Printing Inks Manufacturing Base, Sales Area and Its Competitors
Table 120. HP Indigo Ltd. Deinkable Packaging Printing Inks Product Portfolios and Specifications
Table 121. HP Indigo Ltd. Deinkable Packaging Printing Inks Sales (Tons), Revenue ($ Million), Price (US$/kg) and Gross Margin (2021-2026)
Table 122. HP Indigo Ltd. Main Business
Table 123. HP Indigo Ltd. Latest Developments
Table 124. Flint Group Packaging Solutions Basic Information, Deinkable Packaging Printing Inks Manufacturing Base, Sales Area and Its Competitors
Table 125. Flint Group Packaging Solutions Deinkable Packaging Printing Inks Product Portfolios and Specifications
Table 126. Flint Group Packaging Solutions Deinkable Packaging Printing Inks Sales (Tons), Revenue ($ Million), Price (US$/kg) and Gross Margin (2021-2026)
Table 127. Flint Group Packaging Solutions Main Business
Table 128. Flint Group Packaging Solutions Latest Developments
Table 129. ACTEGA GmbH Basic Information, Deinkable Packaging Printing Inks Manufacturing Base, Sales Area and Its Competitors
Table 130. ACTEGA GmbH Deinkable Packaging Printing Inks Product Portfolios and Specifications
Table 131. ACTEGA GmbH Deinkable Packaging Printing Inks Sales (Tons), Revenue ($ Million), Price (US$/kg) and Gross Margin (2021-2026)
Table 132. ACTEGA GmbH Main Business
Table 133. ACTEGA GmbH Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Picture of Deinkable Packaging Printing Inks
Figure 2. Deinkable Packaging Printing Inks Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global Deinkable Packaging Printing Inks Sales Growth Rate 2021-2032 (Tons)
Figure 7. Global Deinkable Packaging Printing Inks Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. Deinkable Packaging Printing Inks Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. Deinkable Packaging Printing Inks Sales Market Share by Country/Region (2025)
Figure 10. Deinkable Packaging Printing Inks Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of Wash-off Deinkable Inks
Figure 12. Product Picture of Release-layer-assisted Deinkable Systems
Figure 13. Product Picture of Flotation-deinkable Fibre Packaging Inks
Figure 14. Product Picture of Other
Figure 15. Global Deinkable Packaging Printing Inks Sales Market Share by Type in 2026
Figure 16. Global Deinkable Packaging Printing Inks Revenue Market Share by Type (2021-2026)
Figure 17. Product Picture of Polyester-based Substrates
Figure 18. Product Picture of Polyolefin-based Substrates
Figure 19. Product Picture of Fibre-based Substrates
Figure 20. Product Picture of Other Polymer Substrates
Figure 21. Product Picture of Other
Figure 22. Global Deinkable Packaging Printing Inks Sales Market Share by Substrate Material in 2026
Figure 23. Global Deinkable Packaging Printing Inks Revenue Market Share by Substrate Material (2021-2026)
Figure 24. Deinkable Packaging Printing Inks Consumed in Shrink Sleeve Labels
Figure 25. Global Deinkable Packaging Printing Inks Market: Shrink Sleeve Labels (2021-2026) & (Tons)

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Figure 26. Deinkable Packaging Printing Inks Consumed in Flexible Film Packages
Figure 27. Global Deinkable Packaging Printing Inks Market: Flexible Film Packages (2021-2026) & (Tons)
Figure 28. Deinkable Packaging Printing Inks Consumed in Folding Cartons and Paperboard Packages
Figure 29. Global Deinkable Packaging Printing Inks Market: Folding Cartons and Paperboard Packages (2021-2026) & (Tons)
Figure 30. Deinkable Packaging Printing Inks Consumed in Direct-printed Rigid Plastic Packages
Figure 31. Global Deinkable Packaging Printing Inks Market: Direct-printed Rigid Plastic Packages (2021-2026) & (Tons)
Figure 32. Deinkable Packaging Printing Inks Consumed in Other
Figure 33. Global Deinkable Packaging Printing Inks Market: Other (2021-2026) & (Tons)
Figure 34. Global Deinkable Packaging Printing Inks Sale Market Share by Application (2025)
Figure 35. Global Deinkable Packaging Printing Inks Revenue Market Share by Application in 2025
Figure 36. Deinkable Packaging Printing Inks Sales by Company in 2025 (Tons)
Figure 37. Global Deinkable Packaging Printing Inks Sales Market Share by Company in 2025
Figure 38. Deinkable Packaging Printing Inks Revenue by Company in 2025 ($ millions)
Figure 39. Global Deinkable Packaging Printing Inks Revenue Market Share by Company in 2025
Figure 40. Global Deinkable Packaging Printing Inks Sales Market Share by Geographic Region (2021-2026)
Figure 41. Global Deinkable Packaging Printing Inks Revenue Market Share by Geographic Region in 2025
Figure 42. Americas Deinkable Packaging Printing Inks Sales 2021-2026 (Tons)
Figure 43. Americas Deinkable Packaging Printing Inks Revenue 2021-2026 ($ millions)
Figure 44. APAC Deinkable Packaging Printing Inks Sales 2021-2026 (Tons)
Figure 45. APAC Deinkable Packaging Printing Inks Revenue 2021-2026 ($ millions)
Figure 46. Europe Deinkable Packaging Printing Inks Sales 2021-2026 (Tons)
Figure 47. Europe Deinkable Packaging Printing Inks Revenue 2021-2026 ($ millions)
Figure 48. Middle East & Africa Deinkable Packaging Printing Inks Sales 2021-2026 (Tons)
Figure 49. Middle East & Africa Deinkable Packaging Printing Inks Revenue 2021-2026 ($ millions)
Figure 50. Americas Deinkable Packaging Printing Inks Sales Market Share by Country

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in 2025
Figure 51. Americas Deinkable Packaging Printing Inks Revenue Market Share by Country (2021-2026)
Figure 52. Americas Deinkable Packaging Printing Inks Sales Market Share by Type (2021-2026)
Figure 53. Americas Deinkable Packaging Printing Inks Sales Market Share by Application (2021-2026)
Figure 54. United States Deinkable Packaging Printing Inks Revenue Growth 2021-2026 ($ millions)
Figure 55. Canada Deinkable Packaging Printing Inks Revenue Growth 2021-2026 ($ millions)
Figure 56. Mexico Deinkable Packaging Printing Inks Revenue Growth 2021-2026 ($ millions)
Figure 57. Brazil Deinkable Packaging Printing Inks Revenue Growth 2021-2026 ($ millions)
Figure 58. APAC Deinkable Packaging Printing Inks Sales Market Share by Region in 2025
Figure 59. APAC Deinkable Packaging Printing Inks Revenue Market Share by Region (2021-2026)
Figure 60. APAC Deinkable Packaging Printing Inks Sales Market Share by Type (2021-2026)
Figure 61. APAC Deinkable Packaging Printing Inks Sales Market Share by Application (2021-2026)
Figure 62. China Deinkable Packaging Printing Inks Revenue Growth 2021-2026 ($ millions)
Figure 63. Japan Deinkable Packaging Printing Inks Revenue Growth 2021-2026 ($ millions)
Figure 64. South Korea Deinkable Packaging Printing Inks Revenue Growth 2021-2026 ($ millions)
Figure 65. Southeast Asia Deinkable Packaging Printing Inks Revenue Growth 2021-2026 ($ millions)
Figure 66. India Deinkable Packaging Printing Inks Revenue Growth 2021-2026 ($ millions)
Figure 67. Australia Deinkable Packaging Printing Inks Revenue Growth 2021-2026 ($ millions)
Figure 68. China Taiwan Deinkable Packaging Printing Inks Revenue Growth 2021-2026 ($ millions)
Figure 69. Europe Deinkable Packaging Printing Inks Sales Market Share by Country in 2025

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Figure 70. Europe Deinkable Packaging Printing Inks Revenue Market Share by Country (2021-2026)
Figure 71. Europe Deinkable Packaging Printing Inks Sales Market Share by Type (2021-2026)
Figure 72. Europe Deinkable Packaging Printing Inks Sales Market Share by Application (2021-2026)
Figure 73. Germany Deinkable Packaging Printing Inks Revenue Growth 2021-2026 ($ millions)
Figure 74. France Deinkable Packaging Printing Inks Revenue Growth 2021-2026 ($ millions)
Figure 75. UK Deinkable Packaging Printing Inks Revenue Growth 2021-2026 ($ millions)
Figure 76. Italy Deinkable Packaging Printing Inks Revenue Growth 2021-2026 ($ millions)
Figure 77. Russia Deinkable Packaging Printing Inks Revenue Growth 2021-2026 ($ millions)
Figure 78. Middle East & Africa Deinkable Packaging Printing Inks Sales Market Share by Country (2021-2026)
Figure 79. Middle East & Africa Deinkable Packaging Printing Inks Sales Market Share by Type (2021-2026)
Figure 80. Middle East & Africa Deinkable Packaging Printing Inks Sales Market Share by Application (2021-2026)
Figure 81. Egypt Deinkable Packaging Printing Inks Revenue Growth 2021-2026 ($ millions)
Figure 82. South Africa Deinkable Packaging Printing Inks Revenue Growth 2021-2026 ($ millions)
Figure 83. Israel Deinkable Packaging Printing Inks Revenue Growth 2021-2026 ($ millions)
Figure 84. Turkey Deinkable Packaging Printing Inks Revenue Growth 2021-2026 ($ millions)
Figure 85. GCC Countries Deinkable Packaging Printing Inks Revenue Growth 2021-2026 ($ millions)
Figure 86. Manufacturing Cost Structure Analysis of Deinkable Packaging Printing Inks in 2026
Figure 87. Manufacturing Process Analysis of Deinkable Packaging Printing Inks
Figure 88. Industry Chain Structure of Deinkable Packaging Printing Inks
Figure 89. Channels of Distribution
Figure 90. Global Deinkable Packaging Printing Inks Sales Market Forecast by Region (2027-2032)

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Figure 91. Global Deinkable Packaging Printing Inks Revenue Market Share Forecast by Region (2027-2032)
Figure 92. Global Deinkable Packaging Printing Inks Sales Market Share Forecast by Type (2027-2032)
Figure 93. Global Deinkable Packaging Printing Inks Revenue Market Share Forecast by Type (2027-2032)
Figure 94. Global Deinkable Packaging Printing Inks Sales Market Share Forecast by Application (2027-2032)
Figure 95. Global Deinkable Packaging Printing Inks Revenue Market Share Forecast by Application (2027-2032)

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