

Global Papermaking Surface Sizing Agent Market Growth 2026-2032

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Abstracts

The global Papermaking Surface Sizing Agent market size is predicted to grow from US\$ 1114 million in 2025 to US\$ 1550 million in 2032; it is expected to grow at a CAGR of 4.9% from 2026 to 2032.

In 2024, global papermaking surface sizing agents production reached approximately 1,564.07 kilotons, with an average global market price of around US\$ 712 per ton.

Papermaking surface sizing agents are chemical compounds applied to the surface of paper during the manufacturing process to improve its properties and performance. These agents are designed to enhance the paper's surface strength, reduce its absorbency, and provide resistance to penetration by liquids, such as water or ink. Common types of surface sizing agents include starch, synthetic polymers, and combinations of chemicals tailored to specific paper grades and applications. By controlling the surface characteristics of the paper, sizing agents contribute to improved printability, reduced feathering of ink, and increased resistance to water-based damage. The selection of the appropriate surface sizing agent depends on the desired properties of the final paper product and its intended end-use, such as in printing, packaging, or other applications.

Emerging trends towards sustainability present lucrative opportunities for the Papermaking Surface Sizing Agent Market. The shift towards eco-friendly and biodegradable materials is driving innovation in surface sizing formulations. Companies are now focusing on developing natural and sustainable surface sizing agents that align with environmental regulations and consumer preferences. The demand for sustainable packaging solutions is anticipated to increase, with a study from the Paper and Packaging Board indicating that 74% of consumers are willing to pay more for

sustainable packaging options. Additionally, advancements in technology are paving the way for the introduction of high-performance sizing agents that can cater to specific customer requirements, thus expanding the market further.

The Europe market for Papermaking Surface Sizing Agent is estimated to increase from US\$ 306.22 million in 2024 to reach US\$ 409.80 million by 2031, at a CAGR of 4.43% during the forecast period of 2025 through 2031.

The China market for Papermaking Surface Sizing Agent is estimated to increase from US\$ 285.17 million in 2024 to reach US\$ 410.07 million by 2031, at a CAGR of 5.59% during the forecast period of 2025 through 2031.

The global key manufacturers of Papermaking Surface Sizing Agent include Cargill, Kemira, Solenis, Primient, Chengming Chemical, Kurita, Ingredion, Arakawa Chemical, CHEMIPAZ, Harima Chemicals, Transfar Whyyon, Chemigate, Hangzhou, Papermate, Shandong Tiancheng Chemical, Galam, Archroma, Mare, AGRANA, Guangzhou Aodong, Jinhao New Material, Henan Jingxin Fabric, etc. In 2024, the global top five players had a share approximately 59.81% in terms of revenue.

In 2024, Starch-Based Sizing Agents accounted for a share of 61.78% in the global Papermaking Surface Sizing Agent market. And this product segment is poised to reach US\$ 871.09 million by 2031 from US\$ 688.25 million in 2024.

In Papermaking Surface Sizing Agent market, the Packaging Paper holds an important share in terms of Application, and it is expected to reach a value of US\$ 1,045.41 million by 2031, at a CAGR of 5.99% during 2025 and 2031.

The key driver for the Papermaking Surface Sizing Agent market is the global shift toward paper-based sustainable packaging solutions. With plastic bans implemented in over 120 countries, industries are replacing polymer packaging with biodegradable paper, leading to increased demand for internal and surface sizing agents. In 2023, over 75 billion square meters of paper-based packaging were produced globally, with 61% requiring surface treatment using AKD and starch-based sizing agents. This translated to a direct 15% rise in demand for paper-grade sizing agents within one year. Additionally, over 85% of corrugated packaging suppliers globally now employ synthetic sizing agents to improve moisture resistance during transit.

There are many factors acting on the surface sizing agent market, which determine the direction of its enlargement and growth. These factors include technology

developments, law requirements, and market conditions.

The factors responsible for driving the surface sizing agent market include:

1. **Technological Improvements:** The enhancement in surface sizing technology where there is the formulation of high performance and greener agents is supporting the growth of the market. New formulation and application technologies improve the quality and performance of the paper.
2. **Increase in the Number of Eco-Friendly Products:** Because of more emphasis from consumers and regulations on the sustainable products, there is rising adoption of green surface sizing agents. Hence, manufacturers are creating packaging products that contain renewable and biodegradable materials.
3. **Rise in the Packaging and Printing Industry:** The surface sizing agents market is positively impacted by the growth in the packaging and printing industries. The growth of these industries is based on an improved paper that has enhanced printability and durability.
4. **Environmental Regulations:** There has been a rise in the environmental regulations and standards on the VOC content in surface sizing agents which has led to the evolution of low VOC and water-based surface sizing agents. Undoubtedly, the pressure from the regulations is therefore a force for innovative change in the rather conservative surface sizing agent market segment.
5. **Growing Demand for Specialty Paper Products:** This change is framed by the growing demand for specialty paper products, and surface sizing agents are finding opportunities in addressing performance based needs of various attributes, including thermal and filter papers.

Challenges in the surface sizing agent market are:

1. **High Development and Production Costs:** Developing and producing advanced surface sizing agents is likely to be expensive especially where advanced ones are required to be manufactured. Funds required for research, development and production are likely to determine the profitability as well as the entry of new products into the market.
2. **Complex Regulatory Environment:** Over compliance has been a challenge and the

stand for environmental laws keeps changing in credibility. There is a need for compliance and learning about the current regulations in order to produce products that fully satisfy all the standards set.

3. **Raw Material Price Fluctuations:** Changes in the price of surface sizing agents or its ingredients which are mechanical in nature may lead to changes in the production costs. Raw material price changes results in reduced products pricing and subsequently some level of profit.

4. **Competition and Market Saturation:** There are many companies producing surface sizing agents and the rivalry among them is very fierce given that similar types of products are available at similar prices. In such a scenario where the market is saturated, there could be price wars forcing the company into innovation and quality.

5. **Changing Consumer Preferences:** But these trends are also challenges to the companies as their customers' tastes and expectations are changing towards green and high performing products. Companies have to adapt to these changes and new trends by more investment and innovativeness.

The drivers and challenges affecting the market for surface sizing agents exhibit how volatile the market is. Growth in the market is spurred by rising technology advancement, increased sustainability concerns and increasing market size, while costs, regulations, raw materials, competition and consumer tastes, present challenges. It is important to foster all these aspects if the ambition is to get in and stay in the market for the long haul.

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

This Insight Report provides a comprehensive analysis of the global Papermaking Surface Sizing Agent 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 Papermaking Surface Sizing Agent portfolios and capabilities, market entry

strategies, market positions, and geographic footprints, to better understand these firms? unique position in an accelerating global Papermaking Surface Sizing Agent market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Papermaking Surface Sizing Agent and breaks down the forecast by Raw Materials, 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 Papermaking Surface Sizing Agent.

This report presents a comprehensive overview, market shares, and growth opportunities of Papermaking Surface Sizing Agent market by product type, application, key manufacturers and key regions and countries.

Segmentation by Raw Materials:

Starch-Based Sizing Agents

Styrene-Acrylic (SA) Copolymers

Modified Alkyl Ketene Dimer (AKD)

Others

Segmentation by Type:

Natural Sizing Agents

Synthetic Sizing Agents

Segmentation by Application:

Packaging Paper

Printing Paper

Others

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.

Cargill

Kemira

Solenis

Primient

Chengming Chemical

Kurita

Ingredion

Arakawa Chemical

CHEMIPAZ

Harima Chemicals

Transfar Whyyon

Chemigate

Hangzhou Papermate

Shandong Tiancheng Chemical

Galam

Archroma

Mare

AGRANA

Guangzhou Aodong

Jinhao New Material

Henan Jingxin Fabric

Key Questions Addressed in this Report

What is the 10-year outlook for the global Papermaking Surface Sizing Agent market?

What factors are driving Papermaking Surface Sizing Agent market growth, globally and by region?

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

How do Papermaking Surface Sizing Agent market opportunities vary by end market size?

How does Papermaking Surface Sizing Agent break out by Raw Materials, by Application?

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