

Global Solventless Polyurethane Laminating Adhesives Market Growth 2026-2032

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Abstracts

The global Solventless Polyurethane Laminating Adhesives market size is predicted to grow from US\$ 910 million in 2025 to US\$ 1405 million in 2032; it is expected to grow at a CAGR of 6.3% from 2026 to 2032.

Solventless Polyurethane Laminating Adhesives are reactive polyurethane adhesive systems primarily used for laminating flexible packaging films, aluminum foil, metallized films, paper and related substrates. The market is dominated by two-component systems consisting of a resin component and a curing component, while one-component moisture-curing products serve selected packaging structures. These adhesives typically contain nearly 100% active solids and form the bonding layer through polyurethane crosslinking without relying on organic solvents as the application carrier, eliminating the conventional solvent evaporation and drying stage. Product performance is differentiated by curing speed, coating weight, substrate compatibility, bond strength, food-contact safety and resistance to boiling or retort processing, with commercial grades ranging from non-heat-treatment packaging to boil-resistant, retort and high-temperature retort applications. The principal uses cover dry food packaging, fresh food vacuum packaging, ready-meal and retort pouches, pet food packaging, pharmaceutical and medical packaging, household cleaning product packaging and personal care packaging. The market therefore combines formulation chemistry, flexible packaging converting technology and increasingly stringent requirements for productivity, food safety and packaging recyclability.

Key Findings

Global sales volume was estimated at approximately 320.7 thousand tons in 2025 and is expected to reach about 345.1 thousand tons in 2026

The global weighted average selling price is estimated at approximately US\$2.9 per kg, with substantial premiums for retort and specialty grades

Two-component solventless polyurethane systems remain the mainstream product type due to broad substrate compatibility and mature converting processes

Asia-Pacific is the principal production and consumption cluster, while Europe and North America remain important markets for high-performance packaging solutions

High-temperature retort, ultra-low-monomer and recycling-compatible adhesive technologies are becoming important directions for product differentiation

Market Trends

The Solventless Polyurethane Laminating Adhesives industry is moving from conventional general-performance bonding systems toward higher-performance formulations designed for faster curing, higher laminating speeds, demanding heat-treatment conditions and more stringent food-contact requirements. Two-component systems remain dominant, but product development is increasingly focused on reducing residual monomers, shortening curing and slitting times, improving resistance to boiling and retort sterilization, and maintaining adhesion across increasingly complex packaging structures. Henkel has commercialized solvent-free systems for boiling, pasteurization and retort applications with ultra-low-monomer characteristics, while Sun Chemical has obtained recyclability approvals for several solvent-free SunLam adhesives used in polyethylene flexible packaging structures, illustrating the industry's shift toward adhesives that must perform not only as bonding materials but also as enabling components of recyclable packaging design.

Market Dynamics

Drivers

Growth in flexible packaging consumption, the replacement of solvent-based lamination processes and continued investment in solventless laminating equipment are the principal structural drivers of Solventless Polyurethane Laminating Adhesives demand. Solventless processing removes the energy-intensive solvent drying stage, supports higher production efficiency and reduces VOC-related operating requirements, giving converters both economic and environmental incentives to adopt the technology.

Demand is further supported by the expansion of convenience foods, retort pouches, pet food, pharmaceutical packaging and other applications requiring reliable multilayer barrier structures. In Europe, Regulation EU 2025/40 on packaging and packaging waste reinforces the transition toward packaging designed for material recycling, strengthening demand for adhesive systems compatible with recyclable flexible packaging structures.

Restraints

Market expansion is constrained by polyurethane raw-material price volatility, formulation complexity and the qualification requirements imposed by food, pharmaceutical and high-performance packaging applications. Isocyanates, polyester and polyether polyols and functional additives account for a substantial portion of production cost, making adhesive profitability sensitive to petrochemical feedstock movements. At the converter level, switching adhesives may require validation of bond strength, curing behavior, residual primary aromatic amines, ink compatibility and performance under boiling or retort conditions. These qualification cycles raise customer switching costs and can slow the commercial adoption of new suppliers even when their products offer lower prices.

Opportunities

The strongest technology opportunities are emerging in recyclable mono-material packaging, high-speed conversion and demanding thermal-processing applications. As packaging structures shift toward PE-rich or PP-rich mono-material formats, adhesive suppliers increasingly need to provide sufficient bond strength and heat resistance without materially impairing recycling performance. Ultra-low-monomer systems, faster curing products, high-temperature retort grades and adhesives compatible with recyclable polyethylene streams offer opportunities for suppliers to move toward higher-value segments. Sun Chemical's 2025 RecyClass approvals for four solvent-free lamination adhesives demonstrate that recyclability compatibility is becoming a commercially relevant product attribute rather than only a downstream packaging consideration.

Challenges

The key challenge is balancing faster processing and lower cost with food-contact safety, long-term bond performance and increasingly complex packaging-design requirements. High-speed laminating systems require stable viscosity and rapid bond development, while retort and high-barrier packaging require stronger chemical and

thermal resistance. At the same time, converters are under pressure to reduce material complexity and improve recyclability. Adhesive producers therefore need to optimize curing chemistry, residual monomer control, substrate wetting and recycling compatibility simultaneously. Competition from established multinational suppliers and increasingly capable Asian manufacturers also places continued pressure on pricing, technical service and product-development cycles.

Industry Chain Analysis

The upstream industry for Solventless Polyurethane Laminating Adhesives consists primarily of isocyanates, polyester and polyether polyols, specialty resins, chain modifiers, catalysts and functional additives. These materials determine key properties including viscosity, curing rate, bond strength, heat resistance and migration performance. Because polyurethane formulation performance is strongly linked to raw-material consistency and molecular design, access to stable upstream supply and formulation expertise represents an important competitive factor. Changes in MDI-related feedstocks, polyols and other petrochemical intermediates can directly affect production costs and working-capital requirements.

The midstream segment comprises adhesive formulation, polymer synthesis, blending, quality control and technical application support. Product value is created through formulation design rather than simple material mixing, particularly for ultra-low-monomer, fast-curing, boil-resistant and retort grades. Downstream customers are flexible packaging converters operating solventless laminating equipment, which combine films, foil, metallized materials or paper into multilayer packaging structures before printing, slitting, pouch making and filling. The ultimate value of the adhesive is reflected in converting speed, reduced drying-energy requirements, lower VOC management costs, package integrity, food-contact compliance and compatibility with recycling-oriented package designs.

Segment Insights

By product type, Two-Component Solventless Polyurethane Laminating Adhesives constitute the mainstream segment because their resin and curing-agent chemistry can be adjusted across a wide range of flexible packaging structures and performance requirements. One-Component Solventless Polyurethane Laminating Adhesives represent a smaller specialized segment, primarily serving applications where simplified mixing and moisture-curing characteristics provide operating advantages. From a performance perspective, the market can be divided into Non-Heat-Treatment Grade,

Boil-Resistant Grade, Retort Grade, High-Temperature Retort Grade and Other products. The higher-value development direction is moving toward retort and high-temperature retort systems as suppliers improve thermal resistance, curing stability and food-contact safety.

Product segmentation by component system is more stable than segmentation by substrate or mixing ratio because individual commercial adhesives are commonly designed to bond multiple film, foil and metallized structures. Performance-based segmentation by heat-treatment resistance provides a complementary view of technology intensity: non-heat-treatment products serve conventional dry-food and general flexible packaging, boil-resistant products address moderate thermal processing, retort products support approximately 121°C-class processing, while selected high-temperature grades extend toward approximately 135°C applications.

Downstream Market Opportunities

Downstream opportunities are becoming increasingly differentiated by packaging performance requirements. Dry food packaging remains an important volume application because snacks, confectionery, grains and other shelf-stable products use large quantities of laminated flexible packaging. Fresh meat and cheese vacuum packaging require strong bonding under moisture and refrigeration conditions, while ready meals and pet food increasingly create demand for boil-resistant and retort-grade adhesives. Pharmaceutical and medical packaging offer higher technical barriers because package integrity, migration control and regulatory compliance are critical. Household cleaning and personal care refill pouches also provide opportunities as brands move liquid products into lightweight flexible packaging formats. The most attractive incremental opportunities are concentrated in applications where converters require both higher processing performance and more recyclable packaging structures.

Regional Insights

Asia-Pacific represents the principal production and consumption cluster for Solventless Polyurethane Laminating Adhesives. China has developed a broad domestic manufacturing base ranging from large polyurethane adhesive producers to specialized flexible-packaging adhesive companies, while Japan remains important in high-performance formulation technology. India has developed a significant regional manufacturing base led by specialized packaging adhesive producers and integrated flexible packaging groups, while South Korea and Taiwan contribute established polyurethane and specialty adhesive suppliers. Southeast Asia is increasingly important

as a flexible packaging converting and manufacturing location, supported by local production facilities established by Asian and European adhesive groups.

Europe and North America remain strategically important for premium and technically demanding products, particularly high-performance food packaging, medical packaging, ultra-low-monomer systems and recycling-compatible solutions. European packaging regulation is accelerating design-for-recycling requirements, with Regulation EU 2025/40 establishing progressively stronger recyclability requirements for packaging, which is likely to increase technical requirements for lamination adhesives used in recyclable structures. North America retains a large established flexible packaging industry and significant local production capacity. Arkema's acquisition of Dow's flexible packaging laminating adhesives business added five production sites in Italy, the United States and Mexico to its adhesive platform, illustrating the strategic importance of transatlantic manufacturing and customer coverage in this market.

Competitive Landscape Analysis

The competitive landscape of Solventless Polyurethane Laminating Adhesives is characterized by a combination of global diversified adhesive groups, specialized flexible packaging adhesive manufacturers and strong regional producers. Henkel, Arkema through Bostik, H.B. Fuller, DIC through Sun Chemical, COIM, Toyo-Morton, Morchem and Brilliant Polymers form an important group of internationally active suppliers with established packaging technologies, while manufacturers such as Beijing Comens New Materials, Kangda New Materials, Hubei Huitian New Materials, UFlex, SONGWON, Rock Paint, IVP, Nan Pao and other confirmed regional producers strengthen competition in Asia. Competitive differentiation increasingly depends on formulation know-how, retort performance, curing speed, low-monomer technology, regulatory support, local technical service and manufacturing proximity rather than basic adhesive supply alone. Industry consolidation is also reshaping the supplier structure: Arkema completed the acquisition of Dow's flexible packaging laminating adhesives business in December 2024, incorporating a business with approximately US\$250 million in annual sales and five production sites into its Bostik platform, materially strengthening its flexible packaging adhesives position.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the "Solventless Polyurethane Laminating Adhesives Industry Forecast" looks at past sales and reviews total world Solventless Polyurethane Laminating Adhesives sales in 2025, providing a

comprehensive analysis by region and market sector of projected Solventless Polyurethane Laminating Adhesives sales for 2026 through 2032. With Solventless Polyurethane Laminating Adhesives sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Solventless Polyurethane Laminating Adhesives industry.

This Insight Report provides a comprehensive analysis of the global Solventless Polyurethane Laminating Adhesives 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 Solventless Polyurethane Laminating Adhesives portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Solventless Polyurethane Laminating Adhesives market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Solventless Polyurethane Laminating Adhesives 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 Solventless Polyurethane Laminating Adhesives.

This report presents a comprehensive overview, market shares, and growth opportunities of Solventless Polyurethane Laminating Adhesives market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Two-Component Solventless Polyurethane Laminating Adhesives

One-Component Solventless Polyurethane Laminating Adhesives

Other

Segmentation by Heat Resistance Grade:

General-Purpose Grade

Boil-Resistant Grade

Retort Grade

High-Temperature Retort Grade

Other

Segmentation by Application:

Dry Food Packaging

Fresh Food Vacuum Packaging

Ready Meal Packaging

Pet Food Packaging

Pharmaceutical Packaging

Medical Packaging

Household Cleaning Product Packaging

Personal Care Packaging

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.

Henkel AG & Co. KGaA

Arkema S.A.

H.B. Fuller Company

DIC Corporation

C.O.I.M. S.p.A.

Toyo-Morton, Ltd.

Morchem, S.A.U.

Brilliant Polymers Private Limited

Beijing Comens New Materials Co., Ltd.

KANGDA NEW MATERIALS GROUP CO., LTD.

Hubei Huitian New Materials Co., Ltd.

UFlex Limited

Mitsui Chemicals, Inc.

SONGWON Industrial Co., Ltd.

ROCK PAINT CO., LTD.

IVP Limited

POLYSIR SRL

NAN PAO RESINS CHEMICAL CO., LTD.

Xuchuan Chemical Suzhou Co., Ltd.

Jiangsu Huada New Material Co., Ltd.

New East New Materials Co., Ltd.

BeiJing HuaTeng Hightech Corp.

Zhongshan Kingho Chemical Co., Ltd.

Coating P. Materials Co., Ltd.

MEGABOND HUANGSHAN ADHESIVE CO., LTD.

Guangdong Sino-Adhesive New Material Technology Co., Ltd.

Shanghai Duwell New Material Technology Co., Ltd.

Cosmo Speciality Chemicals Private Limited

Eagle Chemicals

IPC CO., LTD.

Guangdong Xinhui Chemical Co., Ltd.

Zhejiang Duobang New Material Co., Ltd.

Pearl Polyurethane Systems LLC

Qingdao Cloud Film Packaging Materials Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Solventless Polyurethane Laminating Adhesives market?

What factors are driving Solventless Polyurethane Laminating Adhesives market growth, globally and by region?

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

How do Solventless Polyurethane Laminating Adhesives market opportunities vary by end market size?

How does Solventless Polyurethane Laminating Adhesives break out by Type, by Application?

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