

# Global Tie-layer Adhesive Resins Market Growth 2026-2032

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## Abstracts

The global Tie-layer Adhesive Resins market size is predicted to grow from US\$ 1565 million in 2025 to US\$ 2119 million in 2032; it is expected to grow at a CAGR of 4.5% from 2026 to 2032.

Tie-layer Adhesive Resins are functional resins used as interlayer bonding materials in multilayer structures. They are typically based on polyolefin carriers such as polyethylene or polypropylene and are modified through grafting or compatibilization to introduce polarity, enabling reliable adhesion between dissimilar substrates. During co-extrusion or lamination, these resins melt and flow to form a continuous tie layer after cooling, providing stable interfacial bonding between polyolefins and polar materials such as PA, EVOH, PET, and metal foil, with performance characterized by peel strength, thermal stability, and chemical resistance. In 2025, global tie-layer adhesive resin production reached 486.80 thousand tons, with an average selling price of USD 3,285 per ton.

Tie-layer Adhesive Resins are key functional materials used as interlayer bonding layers in multilayer structures. Their core value is to deliver reliable adhesion between polyolefins and polar substrates such as PA, EVOH, PET, and metal foil, thereby enabling high-barrier performance, retort resistance, puncture resistance, and long-term seal integrity. Demand is closely linked to multilayer packaging penetration, barrier structure upgrading, tightening requirements in food and pharma packaging, and the expansion of industrial multilayer composites. Overall, the market is characterized by stable volume growth on the packaging side and rising technical requirements driven by structural upgrades that increase performance thresholds and material value. From a regional perspective, supply and leading technology platforms have been dominated by major producers in North America and Europe, while Asia-Pacific, especially China,

concentrates a large share of downstream converting demand and is accelerating localization of capacity and product grades. This results in a layered landscape where international suppliers remain strong in branded, high-end, and highly validated grades, while Asia-Pacific players expand capacity to address mid-range demand and incremental growth. In terms of product mix, the mainstream remains polyolefin-carrier systems that achieve adhesion through functionalization, with MAH-grafted routes being the most widely used due to broad applicability. Non-MAH routes such as ethylene-acrylate copolymers and ionomer-based systems are typically applied to specific structures or processing windows. On the application side, demand is concentrated in multilayer barrier films and sheets for flexible and rigid packaging, foil or metallized composite structures, and extrusion coating and lamination, with continued penetration into pharma and medical packaging as well as industrial multilayer pipes, tubes, and wire and cable jacketing. Cost structure is primarily driven by carrier resins and functionalization-related monomers and additive packages, making economics sensitive to polyolefin feedstock movements and formulation complexity including functional groups, stabilizers, and specialty additives. Manufacturing costs mainly come from extrusion compounding energy consumption, process control for grafting or compounding, and quality assurance for consistency and performance stability. Typical production relies on reactive grafting or compounding via twin-screw extrusion. A representative single-line capacity is 2.55-8.55 kt per year for mid-to-large twin-screw compounding lines, and scale plus automation largely determine unit conversion cost and batch-to-batch stability. Industry gross margin is 20.35%-35.65%, with higher margins typically associated with high-barrier grades, grades used in retort structures, and products meeting stringent compliance needs such as low odor and low extractables. The value chain starts upstream with PE and PP base resins, functionalization raw materials such as MAH, and related additive systems. Midstream suppliers provide tie-layer resin grades either as integrated chemical producers or specialized compounders. Downstream demand is driven by multilayer coextrusion film producers, laminators and extrusion coaters, rigid packaging converters, and selected industrial users in pipes, tubes, and cable applications. Competition is structurally segmented: global leaders tend to control high-end grades and regulatory or customer qualification systems, while regional suppliers compete through cost, delivery responsiveness, and localization. Customer stickiness is high because validation cycles are long and switching risk is material. Key barriers include formulation know-how, adhesion reliability across structures, manufacturing consistency, and compliance capabilities for food-contact, medical-contact, and low-extractables requirements. Looking forward, the market is shifting from purely volume-driven growth toward performance-driven structural upgrading. Higher-barrier and retort-capable structures are increasing in share, and downgauging trends raise requirements for bonding

efficiency and interlayer strength. On the supply side, innovation priorities include lower odor and lower extractables, broader thermal and chemical resistance windows, and recyclability-oriented formulations that support mono-material compatibility or improved recycling performance. With continued capacity expansion in Asia-Pacific and stronger localization incentives among converters, competition will further bifurcate into scale competition for general-purpose grades and qualification-driven competition for high-end applications. Leading suppliers will strengthen share through broader product portfolios and application engineering capability, while smaller players will seek differentiation in niche applications, regional service, and cost efficiency.

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

This Insight Report provides a comprehensive analysis of the global Tie-layer Adhesive Resins 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 Tie-layer Adhesive Resins portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Tie-layer Adhesive Resins market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Tie-layer Adhesive Resins 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 Tie-layer Adhesive Resins.

This report presents a comprehensive overview, market shares, and growth opportunities of Tie-layer Adhesive Resins market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

MAH-Grafted

Non-MAH-Grafted

Segmentation by Carrier Backbone Resin:

PE Resin

PP Resin

EVA Resin

Others

Segmentation by Sales Channel:

Direct Sales

Distribution

Segmentation by Application:

Food and Beverage Packaging

Pharmaceutical and Medical Packaging

Personal Care and Household Products

Industrial Packaging and Logistics

Automotive and Transportation

Building and Construction

Electronics and Electrical

Agriculture

Other Industries

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.

Dow

Mitsui Chemicals

LyondellBasell

Westlake

SK Functional Polymer

Borealis

Mitsubishi Chemical Corporation

LOTTE Chemical

Polyram Group

Industrie Polieco ? MPB

Sumitomo Chemical Co., Ltd.

The Compound Company

Shanghai Banzan Macromolecule Material

Ningbo Nengzhiguang New Materials Technology

Shenyang Ketong Plastic

COACE Chemical

Fine-Blend Polymer (Shanghai)

### **Key Questions Addressed in this Report**

What is the 10-year outlook for the global Tie-layer Adhesive Resins market?

What factors are driving Tie-layer Adhesive Resins market growth, globally and by region?

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

How do Tie-layer Adhesive Resins market opportunities vary by end market size?

How does Tie-layer Adhesive Resins break out by Type, by Application?

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