

Global Tie Layer Resin Market Growth 2026-2032

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Abstracts

The global Tie Layer Resin 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 Resin refers to a class of functional resins used to create reliable adhesion between dissimilar layers in multilayer composite structures. These resins are commonly built on polyolefin backbones such as polyethylene or polypropylene and are modified via grafting or compatibilization to introduce polarity, enabling robust bonding to polar substrates such as PA, EVOH, PET, and metal foil. Under melt-processing conditions (e.g., co-extrusion or lamination), the resin melts and flows, and after cooling forms a continuous tie layer that delivers stable interfacial bonding, typically evaluated by peel strength, thermal stability, and chemical resistance. In 2025, global Tie Layer Resin production reached 486.80 thousand tons, with an average selling price of USD 3,285 per ton.

Tie Layer Resin is a critical enabling material for multilayer composites, where its primary role is to secure interfacial integrity between polyolefins and polar layers, supporting high-barrier performance, retort resistance, chemical resistance, and long-term package or component reliability. Demand is fundamentally driven by multilayer structure penetration and the shift toward higher-performance designs across packaging and selected industrial composites, with technical requirements increasingly emphasizing adhesion robustness under harsher thermal and chemical conditions.

Regionally, North America and Europe continue to lead in high-end grade portfolios, qualification systems, and long-term performance validation, while Asia-Pacific concentrates a large share of downstream converting capacity and is accelerating localization of supply and grades. The resulting landscape is tiered: global leaders are stronger in compliance-heavy, high-reliability applications, whereas regional suppliers

expand rapidly in mid-range segments through cost competitiveness, shorter lead times, and localized technical service.

In terms of product structure, polyolefin-based functionalized systems dominate, with MAH-grafted routes widely adopted due to broad substrate coverage and processing-window compatibility. Non-MAH routes such as ethylene-acrylate copolymers and ionomer-type systems are generally more selective and serve specific structures, performance priorities, or process constraints. Application structure is concentrated in multilayer barrier films and sheets for flexible and rigid packaging, foil or metallized composites, and extrusion coating and lamination, with incremental demand in industrial multilayer pipes, tubes, and wire and cable jacketing.

Cost structure is driven by carrier resins and functionalization inputs plus additive packages, making profitability sensitive to feedstock cycles and formulation complexity. Manufacturing commonly relies on reactive grafting or compounding using twin-screw extrusion, where scale and process control determine conversion cost and batch consistency. A representative single-line capacity is 2.55-8.55 kt per year for mid-to-large twin-screw compounding lines. Industry gross margin is 20.35%-35.65%, and higher-margin segments are typically associated with high-barrier, retort-capable, and low-odor/low-extractables grades.

The industry chain spans upstream PE/PP resins, functionalization materials such as MAH, and additive systems; midstream integrated producers and compounders providing grade portfolios; and downstream converters that require stable qualification and supply reliability. Competitive barriers center on formulation platforms, adhesion reliability across substrate stacks, manufacturing consistency, and regulatory compliance capability. Key trends include barrier and retort upgrades, downgauging-driven bonding efficiency, broader thermal and chemical resistance windows, and recyclability-oriented designs that improve mono-material compatibility and end-of-life performance.

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

This Insight Report provides a comprehensive analysis of the global Tie Layer Resin

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 Resin portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Tie Layer Resin market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Tie Layer Resin 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 Resin.

This report presents a comprehensive overview, market shares, and growth opportunities of Tie Layer Resin market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

MAH-Grafted

Non-MAH

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 Resin market?

What factors are driving Tie Layer Resin market growth, globally and by region?

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

How do Tie Layer Resin market opportunities vary by end market size?

How does Tie Layer Resin break out by Type, by Application?

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 Tie Layer Resin Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for Tie Layer Resin by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for Tie Layer Resin by Country/Region, 2021, 2025 & 2032
- 2.2 Tie Layer Resin Segment by Type
 - 2.2.1 MAH-Grafted
 - 2.2.2 Non-MAH
 - 2.2.3 Tie Layer Resin Sales by Type
 - 2.2.3.1 Global Tie Layer Resin Sales Market Share by Type (2021-2026)
 - 2.2.3.2 Global Tie Layer Resin Revenue and Market Share by Type (2021-2026)
 - 2.2.3.3 Global Tie Layer Resin Sale Price by Type (2021-2026)
- 2.3 Tie Layer Resin Segment by Carrier Backbone Resin
 - 2.3.1 PE Resin
 - 2.3.2 PP Resin
 - 2.3.3 EVA Resin
 - 2.3.4 Others
 - 2.3.5 Tie Layer Resin Sales by Carrier Backbone Resin
 - 2.3.5.1 Global Tie Layer Resin Sales Market Share by Carrier Backbone Resin (2021-2026)
 - 2.3.5.2 Global Tie Layer Resin Revenue and Market Share by Carrier Backbone Resin (2021-2026)
 - 2.3.5.3 Global Tie Layer Resin Sale Price by Carrier Backbone Resin (2021-2026)

2.4 Tie Layer Resin Segment by Sales Channel

2.4.1 Direct Sales

2.4.2 Distribution

2.4.3 Tie Layer Resin Sales by Sales Channel

2.4.3.1 Global Tie Layer Resin Sales Market Share by Sales Channel (2021-2026)

2.4.3.2 Global Tie Layer Resin Revenue and Market Share by Sales Channel (2021-2026)

2.4.3.3 Global Tie Layer Resin Sale Price by Sales Channel (2021-2026)

2.5 Tie Layer Resin Segment by Application

2.5.1 Food and Beverage Packaging

2.5.2 Pharmaceutical and Medical Packaging

2.5.3 Personal Care and Household Products

2.5.4 Industrial Packaging and Logistics

2.5.5 Automotive and Transportation

2.5.6 Building and Construction

2.5.7 Electronics and Electrical

2.5.8 Agriculture

2.5.9 Other Industries

2.5.10 Tie Layer Resin Sales by Application

2.5.10.1 Global Tie Layer Resin Sale Market Share by Application (2021-2026)

2.5.10.2 Global Tie Layer Resin Revenue and Market Share by Application (2021-2026)

2.5.10.3 Global Tie Layer Resin Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Tie Layer Resin Breakdown Data by Company

3.1.1 Global Tie Layer Resin Annual Sales by Company (2021-2026)

3.1.2 Global Tie Layer Resin Sales Market Share by Company (2021-2026)

3.2 Global Tie Layer Resin Annual Revenue by Company (2021-2026)

3.2.1 Global Tie Layer Resin Revenue by Company (2021-2026)

3.2.2 Global Tie Layer Resin Revenue Market Share by Company (2021-2026)

3.3 Global Tie Layer Resin Sale Price by Company

3.4 Key Manufacturers Tie Layer Resin Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Tie Layer Resin Product Location Distribution

3.4.2 Players Tie Layer Resin Products Offered

3.5 Market Concentration Rate Analysis

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 TIE LAYER RESIN BY GEOGRAPHIC REGION

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

5 AMERICAS

- 5.1 Americas Tie Layer Resin Sales by Country
 - 5.1.1 Americas Tie Layer Resin Sales by Country (2021-2026)
 - 5.1.2 Americas Tie Layer Resin Revenue by Country (2021-2026)
- 5.2 Americas Tie Layer Resin Sales by Type (2021-2026)
- 5.3 Americas Tie Layer Resin Sales by Application (2021-2026)
- 5.4 United States
- 5.5 Canada
- 5.6 Mexico
- 5.7 Brazil

6 APAC

- 6.1 APAC Tie Layer Resin Sales by Region
 - 6.1.1 APAC Tie Layer Resin Sales by Region (2021-2026)
 - 6.1.2 APAC Tie Layer Resin Revenue by Region (2021-2026)
- 6.2 APAC Tie Layer Resin Sales by Type (2021-2026)
- 6.3 APAC Tie Layer Resin 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 Tie Layer Resin by Country
 - 7.1.1 Europe Tie Layer Resin Sales by Country (2021-2026)
 - 7.1.2 Europe Tie Layer Resin Revenue by Country (2021-2026)
- 7.2 Europe Tie Layer Resin Sales by Type (2021-2026)
- 7.3 Europe Tie Layer Resin 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 Tie Layer Resin by Country
 - 8.1.1 Middle East & Africa Tie Layer Resin Sales by Country (2021-2026)
 - 8.1.2 Middle East & Africa Tie Layer Resin Revenue by Country (2021-2026)
- 8.2 Middle East & Africa Tie Layer Resin Sales by Type (2021-2026)
- 8.3 Middle East & Africa Tie Layer Resin Sales by Application (2021-2026)
- 8.4 Egypt
- 8.5 South Africa
- 8.6 Israel
- 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 Tie Layer Resin
- 10.3 Manufacturing Process Analysis of Tie Layer Resin
- 10.4 Industry Chain Structure of Tie Layer Resin

11 MARKETING, DISTRIBUTORS AND CUSTOMER

- 11.1 Sales Channel
 - 11.1.1 Direct Channels
 - 11.1.2 Indirect Channels
- 11.2 Tie Layer Resin Distributors
- 11.3 Tie Layer Resin Customer

12 WORLD FORECAST REVIEW FOR TIE LAYER RESIN BY GEOGRAPHIC REGION

- 12.1 Global Tie Layer Resin Market Size Forecast by Region
 - 12.1.1 Global Tie Layer Resin Forecast by Region (2027-2032)
 - 12.1.2 Global Tie Layer Resin 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 Tie Layer Resin Forecast by Type (2027-2032)
- 12.7 Global Tie Layer Resin Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

- 13.1 Dow
 - 13.1.1 Dow Company Information
 - 13.1.2 Dow Tie Layer Resin Product Portfolios and Specifications
 - 13.1.3 Dow Tie Layer Resin Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.1.4 Dow Main Business Overview
 - 13.1.5 Dow Latest Developments
- 13.2 Mitsui Chemicals
 - 13.2.1 Mitsui Chemicals Company Information
 - 13.2.2 Mitsui Chemicals Tie Layer Resin Product Portfolios and Specifications
 - 13.2.3 Mitsui Chemicals Tie Layer Resin Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.2.4 Mitsui Chemicals Main Business Overview
- 13.2.5 Mitsui Chemicals Latest Developments
- 13.3 LyondellBasell
 - 13.3.1 LyondellBasell Company Information
 - 13.3.2 LyondellBasell Tie Layer Resin Product Portfolios and Specifications
 - 13.3.3 LyondellBasell Tie Layer Resin Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.3.4 LyondellBasell Main Business Overview
 - 13.3.5 LyondellBasell Latest Developments
- 13.4 Westlake
 - 13.4.1 Westlake Company Information
 - 13.4.2 Westlake Tie Layer Resin Product Portfolios and Specifications
 - 13.4.3 Westlake Tie Layer Resin Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.4.4 Westlake Main Business Overview
 - 13.4.5 Westlake Latest Developments
- 13.5 SK Functional Polymer
 - 13.5.1 SK Functional Polymer Company Information
 - 13.5.2 SK Functional Polymer Tie Layer Resin Product Portfolios and Specifications
 - 13.5.3 SK Functional Polymer Tie Layer Resin Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.5.4 SK Functional Polymer Main Business Overview
 - 13.5.5 SK Functional Polymer Latest Developments
- 13.6 Borealis
 - 13.6.1 Borealis Company Information
 - 13.6.2 Borealis Tie Layer Resin Product Portfolios and Specifications
 - 13.6.3 Borealis Tie Layer Resin Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.6.4 Borealis Main Business Overview
 - 13.6.5 Borealis Latest Developments
- 13.7 Mitsubishi Chemical Corporation
 - 13.7.1 Mitsubishi Chemical Corporation Company Information
 - 13.7.2 Mitsubishi Chemical Corporation Tie Layer Resin Product Portfolios and Specifications
 - 13.7.3 Mitsubishi Chemical Corporation Tie Layer Resin Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.7.4 Mitsubishi Chemical Corporation Main Business Overview
 - 13.7.5 Mitsubishi Chemical Corporation Latest Developments
- 13.8 LOTTE Chemical
 - 13.8.1 LOTTE Chemical Company Information

- 13.8.2 LOTTE Chemical Tie Layer Resin Product Portfolios and Specifications
- 13.8.3 LOTTE Chemical Tie Layer Resin Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.8.4 LOTTE Chemical Main Business Overview
- 13.8.5 LOTTE Chemical Latest Developments
- 13.9 Polyram Group
 - 13.9.1 Polyram Group Company Information
 - 13.9.2 Polyram Group Tie Layer Resin Product Portfolios and Specifications
 - 13.9.3 Polyram Group Tie Layer Resin Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.9.4 Polyram Group Main Business Overview
 - 13.9.5 Polyram Group Latest Developments
- 13.10 Industrie Polieco ? MPB
 - 13.10.1 Industrie Polieco ? MPB Company Information
 - 13.10.2 Industrie Polieco ? MPB Tie Layer Resin Product Portfolios and Specifications
 - 13.10.3 Industrie Polieco ? MPB Tie Layer Resin Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.10.4 Industrie Polieco ? MPB Main Business Overview
 - 13.10.5 Industrie Polieco ? MPB Latest Developments
- 13.11 Sumitomo Chemical Co., Ltd.
 - 13.11.1 Sumitomo Chemical Co., Ltd. Company Information
 - 13.11.2 Sumitomo Chemical Co., Ltd. Tie Layer Resin Product Portfolios and Specifications
 - 13.11.3 Sumitomo Chemical Co., Ltd. Tie Layer Resin Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.11.4 Sumitomo Chemical Co., Ltd. Main Business Overview
 - 13.11.5 Sumitomo Chemical Co., Ltd. Latest Developments
- 13.12 The Compound Company
 - 13.12.1 The Compound Company Company Information
 - 13.12.2 The Compound Company Tie Layer Resin Product Portfolios and Specifications
 - 13.12.3 The Compound Company Tie Layer Resin Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.12.4 The Compound Company Main Business Overview
 - 13.12.5 The Compound Company Latest Developments
- 13.13 Shanghai Banzan Macromolecule Material
 - 13.13.1 Shanghai Banzan Macromolecule Material Company Information
 - 13.13.2 Shanghai Banzan Macromolecule Material Tie Layer Resin Product Portfolios and Specifications

13.13.3 Shanghai Banzan Macromolecule Material Tie Layer Resin Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 Shanghai Banzan Macromolecule Material Main Business Overview

13.13.5 Shanghai Banzan Macromolecule Material Latest Developments

13.14 Ningbo Nengzhiguang New Materials Technology

13.14.1 Ningbo Nengzhiguang New Materials Technology Company Information

13.14.2 Ningbo Nengzhiguang New Materials Technology Tie Layer Resin Product Portfolios and Specifications

13.14.3 Ningbo Nengzhiguang New Materials Technology Tie Layer Resin Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 Ningbo Nengzhiguang New Materials Technology Main Business Overview

13.14.5 Ningbo Nengzhiguang New Materials Technology Latest Developments

13.15 Shenyang Ketong Plastic

13.15.1 Shenyang Ketong Plastic Company Information

13.15.2 Shenyang Ketong Plastic Tie Layer Resin Product Portfolios and Specifications

13.15.3 Shenyang Ketong Plastic Tie Layer Resin Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 Shenyang Ketong Plastic Main Business Overview

13.15.5 Shenyang Ketong Plastic Latest Developments

13.16 COACE Chemical

13.16.1 COACE Chemical Company Information

13.16.2 COACE Chemical Tie Layer Resin Product Portfolios and Specifications

13.16.3 COACE Chemical Tie Layer Resin Sales, Revenue, Price and Gross Margin (2021-2026)

13.16.4 COACE Chemical Main Business Overview

13.16.5 COACE Chemical Latest Developments

13.17 Fine-Blend Polymer (Shanghai)

13.17.1 Fine-Blend Polymer (Shanghai) Company Information

13.17.2 Fine-Blend Polymer (Shanghai) Tie Layer Resin Product Portfolios and Specifications

13.17.3 Fine-Blend Polymer (Shanghai) Tie Layer Resin Sales, Revenue, Price and Gross Margin (2021-2026)

13.17.4 Fine-Blend Polymer (Shanghai) Main Business Overview

13.17.5 Fine-Blend Polymer (Shanghai) Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Tie Layer Resin Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Tie Layer Resin Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of MAH-Grafted

Table 4. Major Players of Non-MAH

Table 5. Global Tie Layer Resin Sales by Type (2021-2026) & (Tons)

Table 6. Global Tie Layer Resin Sales Market Share by Type (2021-2026)

Table 7. Global Tie Layer Resin Revenue by Type (2021-2026) & (\$ million)

Table 8. Global Tie Layer Resin Revenue Market Share by Type (2021-2026)

Table 9. Global Tie Layer Resin Sale Price by Type (2021-2026) & (US\$/Ton)

Table 10. Major Players of PE Resin

Table 11. Major Players of PP Resin

Table 12. Major Players of EVA Resin

Table 13. Major Players of Others

Table 14. Global Tie Layer Resin Sales by Carrier Backbone Resin (2021-2026) & (Tons)

Table 15. Global Tie Layer Resin Sales Market Share by Carrier Backbone Resin (2021-2026)

Table 16. Global Tie Layer Resin Revenue by Carrier Backbone Resin (2021-2026) & (\$ million)

Table 17. Global Tie Layer Resin Revenue Market Share by Carrier Backbone Resin (2021-2026)

Table 18. Global Tie Layer Resin Sale Price by Carrier Backbone Resin (2021-2026) & (US\$/Ton)

Table 19. Major Players of Direct Sales

Table 20. Major Players of Distribution

Table 21. Global Tie Layer Resin Sales by Sales Channel (2021-2026) & (Tons)

Table 22. Global Tie Layer Resin Sales Market Share by Sales Channel (2021-2026)

Table 23. Global Tie Layer Resin Revenue by Sales Channel (2021-2026) & (\$ million)

Table 24. Global Tie Layer Resin Revenue Market Share by Sales Channel (2021-2026)

Table 25. Global Tie Layer Resin Sale Price by Sales Channel (2021-2026) & (US\$/Ton)

Table 26. Global Tie Layer Resin Sale by Application (2021-2026) & (Tons)

- Table 27. Global Tie Layer Resin Sale Market Share by Application (2021-2026)
- Table 28. Global Tie Layer Resin Revenue by Application (2021-2026) & (\$ million)
- Table 29. Global Tie Layer Resin Revenue Market Share by Application (2021-2026)
- Table 30. Global Tie Layer Resin Sale Price by Application (2021-2026) & (US\$/Ton)
- Table 31. Global Tie Layer Resin Sales by Company (2021-2026) & (Tons)
- Table 32. Global Tie Layer Resin Sales Market Share by Company (2021-2026)
- Table 33. Global Tie Layer Resin Revenue by Company (2021-2026) & (\$ millions)
- Table 34. Global Tie Layer Resin Revenue Market Share by Company (2021-2026)
- Table 35. Global Tie Layer Resin Sale Price by Company (2021-2026) & (US\$/Ton)
- Table 36. Key Manufacturers Tie Layer Resin Producing Area Distribution and Sales Area
- Table 37. Players Tie Layer Resin Products Offered
- Table 38. Tie Layer Resin Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- Table 39. New Products and Potential Entrants
- Table 40. Market M&A Activity & Strategy
- Table 41. Global Tie Layer Resin Sales by Geographic Region (2021-2026) & (Tons)
- Table 42. Global Tie Layer Resin Sales Market Share Geographic Region (2021-2026)
- Table 43. Global Tie Layer Resin Revenue by Geographic Region (2021-2026) & (\$ millions)
- Table 44. Global Tie Layer Resin Revenue Market Share by Geographic Region (2021-2026)
- Table 45. Global Tie Layer Resin Sales by Country/Region (2021-2026) & (Tons)
- Table 46. Global Tie Layer Resin Sales Market Share by Country/Region (2021-2026)
- Table 47. Global Tie Layer Resin Revenue by Country/Region (2021-2026) & (\$ millions)
- Table 48. Global Tie Layer Resin Revenue Market Share by Country/Region (2021-2026)
- Table 49. Americas Tie Layer Resin Sales by Country (2021-2026) & (Tons)
- Table 50. Americas Tie Layer Resin Sales Market Share by Country (2021-2026)
- Table 51. Americas Tie Layer Resin Revenue by Country (2021-2026) & (\$ millions)
- Table 52. Americas Tie Layer Resin Sales by Type (2021-2026) & (Tons)
- Table 53. Americas Tie Layer Resin Sales by Application (2021-2026) & (Tons)
- Table 54. APAC Tie Layer Resin Sales by Region (2021-2026) & (Tons)
- Table 55. APAC Tie Layer Resin Sales Market Share by Region (2021-2026)
- Table 56. APAC Tie Layer Resin Revenue by Region (2021-2026) & (\$ millions)
- Table 57. APAC Tie Layer Resin Sales by Type (2021-2026) & (Tons)
- Table 58. APAC Tie Layer Resin Sales by Application (2021-2026) & (Tons)
- Table 59. Europe Tie Layer Resin Sales by Country (2021-2026) & (Tons)
- Table 60. Europe Tie Layer Resin Revenue by Country (2021-2026) & (\$ millions)

- Table 61. Europe Tie Layer Resin Sales by Type (2021-2026) & (Tons)
- Table 62. Europe Tie Layer Resin Sales by Application (2021-2026) & (Tons)
- Table 63. Middle East & Africa Tie Layer Resin Sales by Country (2021-2026) & (Tons)
- Table 64. Middle East & Africa Tie Layer Resin Revenue Market Share by Country (2021-2026)
- Table 65. Middle East & Africa Tie Layer Resin Sales by Type (2021-2026) & (Tons)
- Table 66. Middle East & Africa Tie Layer Resin Sales by Application (2021-2026) & (Tons)
- Table 67. Key Market Drivers & Growth Opportunities of Tie Layer Resin
- Table 68. Key Market Challenges & Risks of Tie Layer Resin
- Table 69. Key Industry Trends of Tie Layer Resin
- Table 70. Tie Layer Resin Raw Material
- Table 71. Key Suppliers of Raw Materials
- Table 72. Tie Layer Resin Distributors List
- Table 73. Tie Layer Resin Customer List
- Table 74. Global Tie Layer Resin Sales Forecast by Region (2027-2032) & (Tons)
- Table 75. Global Tie Layer Resin Revenue Forecast by Region (2027-2032) & (\$ millions)
- Table 76. Americas Tie Layer Resin Sales Forecast by Country (2027-2032) & (Tons)
- Table 77. Americas Tie Layer Resin Annual Revenue Forecast by Country (2027-2032) & (\$ millions)
- Table 78. APAC Tie Layer Resin Sales Forecast by Region (2027-2032) & (Tons)
- Table 79. APAC Tie Layer Resin Annual Revenue Forecast by Region (2027-2032) & (\$ millions)
- Table 80. Europe Tie Layer Resin Sales Forecast by Country (2027-2032) & (Tons)
- Table 81. Europe Tie Layer Resin Revenue Forecast by Country (2027-2032) & (\$ millions)
- Table 82. Middle East & Africa Tie Layer Resin Sales Forecast by Country (2027-2032) & (Tons)
- Table 83. Middle East & Africa Tie Layer Resin Revenue Forecast by Country (2027-2032) & (\$ millions)
- Table 84. Global Tie Layer Resin Sales Forecast by Type (2027-2032) & (Tons)
- Table 85. Global Tie Layer Resin Revenue Forecast by Type (2027-2032) & (\$ millions)
- Table 86. Global Tie Layer Resin Sales Forecast by Application (2027-2032) & (Tons)
- Table 87. Global Tie Layer Resin Revenue Forecast by Application (2027-2032) & (\$ millions)
- Table 88. Dow Basic Information, Tie Layer Resin Manufacturing Base, Sales Area and Its Competitors
- Table 89. Dow Tie Layer Resin Product Portfolios and Specifications

Table 90. Dow Tie Layer Resin Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 91. Dow Main Business

Table 92. Dow Latest Developments

Table 93. Mitsui Chemicals Basic Information, Tie Layer Resin Manufacturing Base, Sales Area and Its Competitors

Table 94. Mitsui Chemicals Tie Layer Resin Product Portfolios and Specifications

Table 95. Mitsui Chemicals Tie Layer Resin Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 96. Mitsui Chemicals Main Business

Table 97. Mitsui Chemicals Latest Developments

Table 98. LyondellBasell Basic Information, Tie Layer Resin Manufacturing Base, Sales Area and Its Competitors

Table 99. LyondellBasell Tie Layer Resin Product Portfolios and Specifications

Table 100. LyondellBasell Tie Layer Resin Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 101. LyondellBasell Main Business

Table 102. LyondellBasell Latest Developments

Table 103. Westlake Basic Information, Tie Layer Resin Manufacturing Base, Sales Area and Its Competitors

Table 104. Westlake Tie Layer Resin Product Portfolios and Specifications

Table 105. Westlake Tie Layer Resin Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 106. Westlake Main Business

Table 107. Westlake Latest Developments

Table 108. SK Functional Polymer Basic Information, Tie Layer Resin Manufacturing Base, Sales Area and Its Competitors

Table 109. SK Functional Polymer Tie Layer Resin Product Portfolios and Specifications

Table 110. SK Functional Polymer Tie Layer Resin Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 111. SK Functional Polymer Main Business

Table 112. SK Functional Polymer Latest Developments

Table 113. Borealis Basic Information, Tie Layer Resin Manufacturing Base, Sales Area and Its Competitors

Table 114. Borealis Tie Layer Resin Product Portfolios and Specifications

Table 115. Borealis Tie Layer Resin Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 116. Borealis Main Business

Table 117. Borealis Latest Developments

Table 118. Mitsubishi Chemical Corporation Basic Information, Tie Layer Resin Manufacturing Base, Sales Area and Its Competitors

Table 119. Mitsubishi Chemical Corporation Tie Layer Resin Product Portfolios and Specifications

Table 120. Mitsubishi Chemical Corporation Tie Layer Resin Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 121. Mitsubishi Chemical Corporation Main Business

Table 122. Mitsubishi Chemical Corporation Latest Developments

Table 123. LOTTE Chemical Basic Information, Tie Layer Resin Manufacturing Base, Sales Area and Its Competitors

Table 124. LOTTE Chemical Tie Layer Resin Product Portfolios and Specifications

Table 125. LOTTE Chemical Tie Layer Resin Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 126. LOTTE Chemical Main Business

Table 127. LOTTE Chemical Latest Developments

Table 128. Polyram Group Basic Information, Tie Layer Resin Manufacturing Base, Sales Area and Its Competitors

Table 129. Polyram Group Tie Layer Resin Product Portfolios and Specifications

Table 130. Polyram Group Tie Layer Resin Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 131. Polyram Group Main Business

Table 132. Polyram Group Latest Developments

Table 133. Industrie Polieco ? MPB Basic Information, Tie Layer Resin Manufacturing Base, Sales Area and Its Competitors

Table 134. Industrie Polieco ? MPB Tie Layer Resin Product Portfolios and Specifications

Table 135. Industrie Polieco ? MPB Tie Layer Resin Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 136. Industrie Polieco ? MPB Main Business

Table 137. Industrie Polieco ? MPB Latest Developments

Table 138. Sumitomo Chemical Co., Ltd. Basic Information, Tie Layer Resin Manufacturing Base, Sales Area and Its Competitors

Table 139. Sumitomo Chemical Co., Ltd. Tie Layer Resin Product Portfolios and Specifications

Table 140. Sumitomo Chemical Co., Ltd. Tie Layer Resin Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 141. Sumitomo Chemical Co., Ltd. Main Business

Table 142. Sumitomo Chemical Co., Ltd. Latest Developments

Table 143. The Compound Company Basic Information, Tie Layer Resin Manufacturing Base, Sales Area and Its Competitors

Table 144. The Compound Company Tie Layer Resin Product Portfolios and Specifications

Table 145. The Compound Company Tie Layer Resin Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 146. The Compound Company Main Business

Table 147. The Compound Company Latest Developments

Table 148. Shanghai Banzan Macromolecule Material Basic Information, Tie Layer Resin Manufacturing Base, Sales Area and Its Competitors

Table 149. Shanghai Banzan Macromolecule Material Tie Layer Resin Product Portfolios and Specifications

Table 150. Shanghai Banzan Macromolecule Material Tie Layer Resin Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 151. Shanghai Banzan Macromolecule Material Main Business

Table 152. Shanghai Banzan Macromolecule Material Latest Developments

Table 153. Ningbo Nengzhiguang New Materials Technology Basic Information, Tie Layer Resin Manufacturing Base, Sales Area and Its Competitors

Table 154. Ningbo Nengzhiguang New Materials Technology Tie Layer Resin Product Portfolios and Specifications

Table 155. Ningbo Nengzhiguang New Materials Technology Tie Layer Resin Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 156. Ningbo Nengzhiguang New Materials Technology Main Business

Table 157. Ningbo Nengzhiguang New Materials Technology Latest Developments

Table 158. Shenyang Ketong Plastic Basic Information, Tie Layer Resin Manufacturing Base, Sales Area and Its Competitors

Table 159. Shenyang Ketong Plastic Tie Layer Resin Product Portfolios and Specifications

Table 160. Shenyang Ketong Plastic Tie Layer Resin Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 161. Shenyang Ketong Plastic Main Business

Table 162. Shenyang Ketong Plastic Latest Developments

Table 163. COACE Chemical Basic Information, Tie Layer Resin Manufacturing Base, Sales Area and Its Competitors

Table 164. COACE Chemical Tie Layer Resin Product Portfolios and Specifications

Table 165. COACE Chemical Tie Layer Resin Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 166. COACE Chemical Main Business

Table 167. COACE Chemical Latest Developments

Table 168. Fine-Blend Polymer (Shanghai) Basic Information, Tie Layer Resin Manufacturing Base, Sales Area and Its Competitors

Table 169. Fine-Blend Polymer (Shanghai) Tie Layer Resin Product Portfolios and Specifications

Table 170. Fine-Blend Polymer (Shanghai) Tie Layer Resin Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 171. Fine-Blend Polymer (Shanghai) Main Business

Table 172. Fine-Blend Polymer (Shanghai) Latest Developments

List Of Figures

LIST OF FIGURES

Figure 1. Picture of Tie Layer Resin

Figure 2. Tie Layer Resin Report Years Considered

Figure 3. Research Objectives

Figure 4. Research Methodology

Figure 5. Research Process and Data Source

Figure 6. Global Tie Layer Resin Sales Growth Rate 2021-2032 (Tons)

Figure 7. Global Tie Layer Resin Revenue Growth Rate 2021-2032 (\$ millions)

Figure 8. Tie Layer Resin Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Figure 9. Tie Layer Resin Sales Market Share by Country/Region (2025)

Figure 10. Tie Layer Resin Sales Market Share by Country/Region (2021, 2025 & 2032)

Figure 11. Product Picture of MAH-Grafted

Figure 12. Product Picture of Non-MAH

Figure 13. Global Tie Layer Resin Sales Market Share by Type in 2026

Figure 14. Global Tie Layer Resin Revenue Market Share by Type (2021-2026)

Figure 15. Product Picture of PE Resin

Figure 16. Product Picture of PP Resin

Figure 17. Product Picture of EVA Resin

Figure 18. Product Picture of Others

Figure 19. Global Tie Layer Resin Sales Market Share by Carrier Backbone Resin in 2026

Figure 20. Global Tie Layer Resin Revenue Market Share by Carrier Backbone Resin (2021-2026)

Figure 21. Product Picture of Direct Sales

Figure 22. Product Picture of Distribution

Figure 23. Global Tie Layer Resin Sales Market Share by Sales Channel in 2026

Figure 24. Global Tie Layer Resin Revenue Market Share by Sales Channel (2021-2026)

Figure 25. Tie Layer Resin Consumed in Food and Beverage Packaging

Figure 26. Global Tie Layer Resin Market: Food and Beverage Packaging (2021-2026) & (Tons)

Figure 27. Tie Layer Resin Consumed in Pharmaceutical and Medical Packaging

Figure 28. Global Tie Layer Resin Market: Pharmaceutical and Medical Packaging (2021-2026) & (Tons)

Figure 29. Tie Layer Resin Consumed in Personal Care and Household Products

Figure 30. Global Tie Layer Resin Market: Personal Care and Household Products (2021-2026) & (Tons)

Figure 31. Tie Layer Resin Consumed in Industrial Packaging and Logistics

Figure 32. Global Tie Layer Resin Market: Industrial Packaging and Logistics (2021-2026) & (Tons)

Figure 33. Tie Layer Resin Consumed in Automotive and Transportation

Figure 34. Global Tie Layer Resin Market: Automotive and Transportation (2021-2026) & (Tons)

Figure 35. Tie Layer Resin Consumed in Building and Construction

Figure 36. Global Tie Layer Resin Market: Building and Construction (2021-2026) & (Tons)

Figure 37. Tie Layer Resin Consumed in Electronics and Electrical

Figure 38. Global Tie Layer Resin Market: Electronics and Electrical (2021-2026) & (Tons)

Figure 39. Tie Layer Resin Consumed in Agriculture

Figure 40. Global Tie Layer Resin Market: Agriculture (2021-2026) & (Tons)

Figure 41. Tie Layer Resin Consumed in Other Industries

Figure 42. Global Tie Layer Resin Market: Other Industries (2021-2026) & (Tons)

Figure 43. Global Tie Layer Resin Sale Market Share by Application (2025)

Figure 44. Global Tie Layer Resin Revenue Market Share by Application in 2025

Figure 45. Tie Layer Resin Sales by Company in 2025 (Tons)

Figure 46. Global Tie Layer Resin Sales Market Share by Company in 2025

Figure 47. Tie Layer Resin Revenue by Company in 2025 (\$ millions)

Figure 48. Global Tie Layer Resin Revenue Market Share by Company in 2025

Figure 49. Global Tie Layer Resin Sales Market Share by Geographic Region (2021-2026)

Figure 50. Global Tie Layer Resin Revenue Market Share by Geographic Region in 2025

Figure 51. Americas Tie Layer Resin Sales 2021-2026 (Tons)

Figure 52. Americas Tie Layer Resin Revenue 2021-2026 (\$ millions)

Figure 53. APAC Tie Layer Resin Sales 2021-2026 (Tons)

Figure 54. APAC Tie Layer Resin Revenue 2021-2026 (\$ millions)

Figure 55. Europe Tie Layer Resin Sales 2021-2026 (Tons)

Figure 56. Europe Tie Layer Resin Revenue 2021-2026 (\$ millions)

Figure 57. Middle East & Africa Tie Layer Resin Sales 2021-2026 (Tons)

Figure 58. Middle East & Africa Tie Layer Resin Revenue 2021-2026 (\$ millions)

Figure 59. Americas Tie Layer Resin Sales Market Share by Country in 2025

Figure 60. Americas Tie Layer Resin Revenue Market Share by Country (2021-2026)

Figure 61. Americas Tie Layer Resin Sales Market Share by Type (2021-2026)

- Figure 62. Americas Tie Layer Resin Sales Market Share by Application (2021-2026)
- Figure 63. United States Tie Layer Resin Revenue Growth 2021-2026 (\$ millions)
- Figure 64. Canada Tie Layer Resin Revenue Growth 2021-2026 (\$ millions)
- Figure 65. Mexico Tie Layer Resin Revenue Growth 2021-2026 (\$ millions)
- Figure 66. Brazil Tie Layer Resin Revenue Growth 2021-2026 (\$ millions)
- Figure 67. APAC Tie Layer Resin Sales Market Share by Region in 2025
- Figure 68. APAC Tie Layer Resin Revenue Market Share by Region (2021-2026)
- Figure 69. APAC Tie Layer Resin Sales Market Share by Type (2021-2026)
- Figure 70. APAC Tie Layer Resin Sales Market Share by Application (2021-2026)
- Figure 71. China Tie Layer Resin Revenue Growth 2021-2026 (\$ millions)
- Figure 72. Japan Tie Layer Resin Revenue Growth 2021-2026 (\$ millions)
- Figure 73. South Korea Tie Layer Resin Revenue Growth 2021-2026 (\$ millions)
- Figure 74. Southeast Asia Tie Layer Resin Revenue Growth 2021-2026 (\$ millions)
- Figure 75. India Tie Layer Resin Revenue Growth 2021-2026 (\$ millions)
- Figure 76. Australia Tie Layer Resin Revenue Growth 2021-2026 (\$ millions)
- Figure 77. China Taiwan Tie Layer Resin Revenue Growth 2021-2026 (\$ millions)
- Figure 78. Europe Tie Layer Resin Sales Market Share by Country in 2025
- Figure 79. Europe Tie Layer Resin Revenue Market Share by Country (2021-2026)
- Figure 80. Europe Tie Layer Resin Sales Market Share by Type (2021-2026)
- Figure 81. Europe Tie Layer Resin Sales Market Share by Application (2021-2026)
- Figure 82. Germany Tie Layer Resin Revenue Growth 2021-2026 (\$ millions)
- Figure 83. France Tie Layer Resin Revenue Growth 2021-2026 (\$ millions)
- Figure 84. UK Tie Layer Resin Revenue Growth 2021-2026 (\$ millions)
- Figure 85. Italy Tie Layer Resin Revenue Growth 2021-2026 (\$ millions)
- Figure 86. Russia Tie Layer Resin Revenue Growth 2021-2026 (\$ millions)
- Figure 87. Middle East & Africa Tie Layer Resin Sales Market Share by Country (2021-2026)
- Figure 88. Middle East & Africa Tie Layer Resin Sales Market Share by Type (2021-2026)
- Figure 89. Middle East & Africa Tie Layer Resin Sales Market Share by Application (2021-2026)
- Figure 90. Egypt Tie Layer Resin Revenue Growth 2021-2026 (\$ millions)
- Figure 91. South Africa Tie Layer Resin Revenue Growth 2021-2026 (\$ millions)
- Figure 92. Israel Tie Layer Resin Revenue Growth 2021-2026 (\$ millions)
- Figure 93. Turkey Tie Layer Resin Revenue Growth 2021-2026 (\$ millions)
- Figure 94. GCC Countries Tie Layer Resin Revenue Growth 2021-2026 (\$ millions)
- Figure 95. Manufacturing Cost Structure Analysis of Tie Layer Resin in 2026
- Figure 96. Manufacturing Process Analysis of Tie Layer Resin
- Figure 97. Industry Chain Structure of Tie Layer Resin

Figure 98. Channels of Distribution

Figure 99. Global Tie Layer Resin Sales Market Forecast by Region (2027-2032)

Figure 100. Global Tie Layer Resin Revenue Market Share Forecast by Region (2027-2032)

Figure 101. Global Tie Layer Resin Sales Market Share Forecast by Type (2027-2032)

Figure 102. Global Tie Layer Resin Revenue Market Share Forecast by Type (2027-2032)

Figure 103. Global Tie Layer Resin Sales Market Share Forecast by Application (2027-2032)

Figure 104. Global Tie Layer Resin Revenue Market Share Forecast by Application (2027-2032)

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