

Packaging Adhesive Market Forecasts to 2034 – Global Analysis By Product Type (Coating, Flexible Foam, Elastomers, Rigid Foam and Other Product Types), Raw Material Type, Packaging Type, Adhesive Chemistry, Technology, Application, End User, and By Geography

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Abstracts

According to Statistics MRC, the Global Packaging Adhesive Market is accounted for \$18.7 billion in 2026 and is expected to reach \$28.1 billion by 2034 growing at a CAGR of 5.2% during the forecast period. Packaging adhesive refers to a specialized type of adhesive designed for bonding, sealing, and laminating materials in the packaging industry. They are formulated to adhere to a wide range of substrates commonly used in packaging, such as paper, cardboard, plastics, and metals. They contribute to the efficiency of packaging processes by providing strong and reliable bonds that withstand the stresses of transportation and handling.

According to the India Brand Equity Foundation (IBEF), the packaging industry in India is expected to reach USD 204.81 billion by 2025, with food processing being the largest packaging consumer.

Market Dynamics:

Driver:

Rising demand for sustainable solutions

Sustainable packaging adhesives contribute to a circular economy by supporting the

recycling process. As environmental consciousness grows globally, consumers, industries, and regulatory bodies increasingly prioritize eco-friendly practices. Moreover, manufacturers are responding by developing adhesives with reduced environmental impact, incorporating biodegradable components, and ensuring recyclability, which is boosting this market expansion.

Restraint:

High cost of raw materials

The cost of raw materials directly affects the overall production cost and profitability of adhesive manufacturers, which can have an impact on the pricing and affordability of these products. The raw materials used in adhesive formulations, such as resins, solvents, additives, and curing agents, are subject to price fluctuations influenced by global supply and demand dynamics. Additionally, specialty or high-performance raw materials, which tend to have higher costs compared to standard raw materials, further drive up the overall cost of production.

Opportunity:

Innovations in packaging design

Packaging adhesives play a crucial role in enabling these innovations by facilitating the bonding of diverse materials and supporting intricate design elements. Advanced adhesive technologies allow for the creation of secure seals, flexible packaging formats, and unique labeling applications. Moreover, the rise of e-commerce has spurred innovations in packaging to withstand the challenges of online shipping, reinforcing the importance of adhesives in ensuring package integrity during transportation and thereby driving this market significantly.

Threat:

Lack of awareness

There is a wide range of adhesive types and formulations available, but many businesses and consumers may be unaware of the importance of selecting the right adhesive or may have limited knowledge about the available options and their specific applications. As a result, businesses and consumers may make uninformed choices or opt for suboptimal adhesive solutions, leading to potential issues. This can hinder the

adoption of newer, more effective adhesive solutions and perpetuate the use of traditional, less efficient options.

Covid-19 Impact

The COVID-19 pandemic has exerted several negative impacts on the market, disrupting supply chains, dampening demand, and influencing market dynamics. Supply chain disruptions, including shortages of raw materials and transportation bottlenecks, posed significant challenges for adhesive manufacturers, leading to potential delays in production and distribution. Additionally, uncertainties in the global economy prompted many businesses to reevaluate their spending, potentially affecting investment in new packaging projects and innovations and significantly hindering market growth.

The polyol segment is expected to be the largest during the forecast period

The polyol segment is estimated to hold the largest share. Polyols are versatile compounds that serve as essential components in the production of polyurethane-based adhesives, which are widely used in the packaging industry. They offer excellent bonding strength, flexibility, and resistance to environmental factors, making them suitable for various packaging applications. Furthermore, their versatility allows for the creation of strong and durable bonds, ensuring the integrity of packaging materials throughout the supply chain, which propels this segment's size.

The semi-rigid packaging segment is expected to have the highest CAGR during the forecast period

The semi-rigid packaging segment is anticipated to have highest CAGR during the forecast period due to a class of packaging materials that possess attributes of both flexibility and rigidity. This packaging category includes materials like PET (polyethylene terephthalate), PP (polypropylene), and thermoformed containers, widely used in industries such as food, pharmaceuticals, and consumer goods. Moreover, facilitate the incorporation of innovative design elements and the visual appeal of the packaging, which is boosting this segment's growth.

Region with largest share:

North America commanded the largest market share during the extrapolated period owing to the development of advanced adhesive technologies, including eco-friendly formulations and high-performance adhesives. The rise of e-commerce in North

America has heightened the demand for reliable and secure packaging, thereby influencing adhesive requirements. Additionally, stringent regulations governing food safety, product labeling, and environmental impact drive the adoption of compliant packaging adhesives.

Region with highest CAGR:

Asia Pacific is expected to witness highest CAGR over the projection period, owing to growing industrialization, urbanization, and increasing consumer demand. Countries such as China, India, Japan, and South Korea are at the forefront of shaping the trajectory of the packaging adhesive industry. Moreover, sustainability considerations have gained prominence, driving the development and adoption of eco-friendly packaging adhesives in response to environmental awareness and regulatory initiatives.

Key players in the market

Some of the key players in the Packaging Adhesive Market include The Dow Chemical Company, Arkema, Jowat AG, Lubrizol Corporation, Wacker Chemie AG, Henkel AG & Co. KGaA, Huntsman Corporation, Avery Dennison, HB Fuller and 3M Company

Key Developments:

In November 2023, 3M Health Information Systems (HIS) announces a broader collaboration with Smart Reporting, with this collaboration, 3M HIS extends its portfolio of solutions that includes 3M™™*Modal Fluency for Imaging.

In September 2023, Huntsman Corporation launched its Technology Portal, a platform dedicated to engaging with innovators and manufacturers across the value chain.

In August 2022, Huntsman Corporation announced it has entered into a definitive agreement to sell its Textile Effects division to Archroma, a portfolio company of SK Capital Partners.

Product Types Covered:

Coating

Flexible Foam

Elastomers

Rigid Foam

Other Product Types

Raw Material Types Covered:

Methylene Diphenyl Diisocyanate (MDI)

Polyol

Toluene Diisocyanate (TDI)

Other Material Types

Packaging Types Covered:

Semi-Rigid Packaging

Rigid-Packaging

Flexible Packaging

Other Packaging Types

Adhesive Chemistry Covered:

Acrylic

Polyurethane

Phenolic

Polyamide

Epoxy

Ethylene Vinyl Acetate (EVA)

Polyvinyl Acetate (PVA)

Polyacrylic Ester (PAE)

Technologies Covered:

Solvent-Based

Water-Based

Hot Melt

Other Technologies

Applications Covered:

Boxes & Cases

Labeling

Laminating Film

Corrugated Boxes

Folding Cartons

Paper Bags

Other Applications

End Users Covered:

Cosmetics and Personal Care

Healthcare

Automotive

Consumer Goods

Electrical and Electronics

Food and Beverages

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2021, 2022, 2023, 2026, and 2030
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Table Note: Tables for North America, Europe, APAC, South America, and Middle East
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