

# **Packaging Adhesives Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Technology (Water-based, Solvent-Based, Hot Melt, Others), By Resins (PVA, Acrylics, Polyurethane, Others), By Application (Cases & Carton, Corrugated Packaging, Labeling, Flexible Packaging, Folding Cartons, Speciality Packaging, Others), By Region and Competition**

<https://marketpublishers.com/r/P130BBBD7EF3EN.html>

Date: October 2023

Pages: 180

Price: US\$ 4,900.00 (Single User License)

ID: P130BBBD7EF3EN

## **Abstracts**

The Global Packaging Adhesives Market achieved a valuation of USD 14.34 billion in 2022 and is poised for steady growth in the forecast period, with a projected Compound Annual Growth Rate (CAGR) of 3.20% through 2028 and is expected to reach 17.21 billion by 2028. Packaging adhesives play a pivotal role in delivering strong bonding solutions that meet the demanding requirements of diverse applications across various end-use products, including boxes and cartons. These adhesives are available in various formulations, with water-based adhesives being a prominent type, crafted through the amalgamation of water, polymers, and additives.

### **Key Market Drivers**

#### **1. Rising Demand for Packaging Adhesives in Flexible Packaging**

Flexible packaging has emerged as a transformative force in the packaging industry, driven by its versatility, convenience, and sustainability. This evolution has led to a growing demand for packaging adhesives tailored to meet the unique requirements of flexible packaging applications. As consumer preferences and market dynamics evolve,

the demand for flexible packaging continues to surge, creating a ripple effect in the demand for compatible adhesives. Flexible packaging encompasses a wide range of products, including pouches, sachets, stand-up pouches, wraps, labels, and more. Its appeal lies in its ability to adapt to various shapes, sizes, and product types while providing protection from external elements such as moisture, light, and air. Flexible packaging is preferred in diverse industries, including food and beverages, pharmaceuticals, cosmetics, and personal care. In this dynamic landscape, packaging adhesives play a crucial role in ensuring the integrity of flexible packaging by facilitating heat and cold sealing, lidding, lamination, blister packaging, horizontal flow wrapping, and form-fill-seal applications. These adhesives provide the necessary bonding strength and seal integrity, which are critical for maintaining the freshness, safety, and overall quality of the packaged products.

## 2. Increasing Demand for Packaging Adhesives in the Food & Beverage Sector

In the intricate world of the food and beverage sector, packaging plays a crucial role in safeguarding the integrity and quality of products. The evolution of packaging solutions in this sector is driven by consumer demands, regulatory requirements, and technological innovations. Packaging adhesives are essential in meeting these demands, ensuring that closures, seals, and labels are secure and tamper-evident. They play a vital role in maintaining the freshness and safety of consumable products. Heat-sealing applications, facilitated by packaging adhesives, preserve perishable products by shielding them from external elements such as moisture, oxygen, and contaminants. Packaging adhesives also contribute to creating airtight seals that effectively shield products from deterioration and enhance the overall consumer experience. The demand for packaging adhesives in the food and beverage sector is further driven by the trend of convenience-driven packaging solutions. Consumers seek packaging that is not only functional but also user-friendly and time-efficient, leading to the proliferation of easy-open and resealable packaging that relies on adhesives for effective sealing and resealing mechanisms. Additionally, the sector is undergoing a transformation driven by changing consumer preferences and heightened awareness of health and sustainability. As consumers seek transparency and responsible packaging practices, manufacturers are responding by adopting eco-friendly packaging solutions. Water-based adhesives, characterized by their low volatile organic compound (VOC) emissions and reduced environmental impact, are gaining traction in this context.

## 3. Rising Demand for Packaging Adhesives in the Pharmaceutical Sector

In the pharmaceutical sector, where precision, safety, and product integrity are

paramount, packaging plays a pivotal role. Packaging adhesives are crucial in meeting the stringent regulations and meticulous quality standards that govern this industry. They ensure that closures, seals, and labels are secure and tamper-evident, enhancing patient safety and trust. Packaging adhesives cater to diverse packaging needs in the pharmaceutical sector, from blister packs to vials, syringes, and ampoules, where they create secure and airtight seals to safeguard products from contaminants, moisture, and other external factors. Packaging adhesives also support the adoption of innovative packaging solutions in the sector, such as single-dose packaging, multi-dose packaging, and easy-to-open containers. Adhesive-sealed blister packs, for instance, provide dose protection and enable easy access to medications while minimizing the risk of contamination.

## Key Market Challenges

### 1. Cost-Effectiveness and Compatibility with Automation

Balancing cost-effectiveness with product performance and sustainability remains a significant challenge in the packaging adhesive market. Developing advanced adhesive formulations, sourcing eco-friendly materials, and meeting regulatory standards can lead to higher production costs. Adhesive manufacturers must find ways to offer competitive pricing while delivering value to customers. Additionally, as automation becomes more prevalent in packaging processes, adhesives must be compatible with automated equipment. This involves factors such as adhesive viscosity, drying time, and dispensing methods. Manufacturers must ensure that their products can be seamlessly integrated into automated production lines.

### 2. Sustainability Concerns and Evolving Consumer Preferences

The emphasis on sustainability has significantly impacted the packaging industry, including adhesives. Consumers and regulatory bodies are pushing for environmentally friendly packaging solutions. Packaging adhesives often contain petroleum-based components, contributing to plastic waste and carbon emissions. Manufacturers are under pressure to develop eco-friendly alternatives that are biodegradable, compostable, and sourced from renewable materials. Additionally, consumer preferences are rapidly changing, driven by factors such as convenience, visual appeal, and environmental consciousness. Packaging adhesives must cater to various packaging styles, materials, and designs while ensuring ease of use for consumers. Meeting these diverse demands requires constant innovation in adhesive formulations and application methods. Adhesive residues on packaging materials can complicate

recycling processes, so adhesive manufacturers must develop solutions that allow for clean and efficient recycling while maintaining adhesion performance.

## Key Market Trends

### 1. Sustainability

With increasing awareness of environmental concerns, consumers are seeking eco-friendly packaging options. This demand has spurred innovation in adhesive technologies that enable recyclability and compostability of packaging materials. Manufacturers are developing adhesives that not only offer strong bonding properties but also align with the principles of the circular economy. Water-based and bio-based adhesives have gained traction due to their reduced environmental impact and compatibility with recycling processes. Brands are actively adopting sustainable adhesives to align with their corporate social responsibility goals and cater to eco-conscious consumers.

### 2. Rise of E-commerce and Online Shopping

The rise of e-commerce and online shopping has led to a surge in demand for robust packaging solutions. Packaging adhesives designed for e-commerce applications must withstand the challenges of long-distance transportation, varying climatic conditions, and rough handling. Adhesives used in this context should provide strong bonding capabilities to prevent package tampering and ensure product safety. Manufacturers are developing adhesives with enhanced flexibility, durability, and resistance to external factors to meet the specific requirements of the e-commerce sector.

### 3. Digitalization and Automation

Digitalization and automation are transforming various industries, including packaging. Automation enables precise adhesive application, reducing wastage and ensuring consistent bonding. Smart adhesive application systems can adjust adhesive volumes based on packaging specifications, optimizing adhesive usage. This not only reduces costs but also contributes to sustainable practices by minimizing material wastage. Additionally, adhesives used in food packaging must be FDA-approved and should not pose any risk of migration into the packaged food. Manufacturers are developing food-safe adhesives that maintain a strong bond while ensuring the safety of packaged products. This trend reflects the industry's commitment to providing consumers with packaging solutions that preserve the quality and integrity of food items.

## Segmental

### Insights

#### 1. Technology Insights

Among the technology categories, water-borne adhesives emerged as the dominant player in the global packaging adhesives market in 2022. These adhesives are known for their improved resistance to moisture compared to other types and can be categorized into solutions and latexes. Solutions are formulated from materials soluble exclusively in water or alkaline water, while latex refers to a stable dispersion of a polymeric substance within an aqueous medium. Solvent-based adhesives, which are formulated with solvents, are also prevalent but face environmental concerns due to volatile organic compound (VOC) emissions. Hot-melt adhesives, known for instant bonding, are popular in packaging applications, offering ease of application and rapid processing.

#### 2. Resin Insights

Polyvinyl acetate (PVA) adhesives emerged as the dominant player in the global market for packaging adhesives in 2022. PVA adhesives are versatile and suitable for bonding various substrates commonly found in packaging, including paper, cardboard, wood, and certain plastics. They are easy to handle and apply, with a relatively fast drying time, making them suitable for high-speed packaging lines. PVA adhesives form strong bonds, offer flexibility, and are water-based, making them safe for food packaging.

#### 3. Application Insights

Flexible packaging applications dominated the global market for packaging adhesives in 2022. Adhesives used in flexible packaging facilitate various processes, including heat and cold sealing, lidding, lamination, blister packaging, horizontal flow packaging, and form-fill-seal applications. The demand for flexible packaging is primarily driven by the food and beverage sector.

## Regional Insights

#### 1. North America

North America emerged as the dominant player in the global packaging adhesives market in 2022. The region is witnessing increased utilization of water-based adhesives, driven by technological advancements, adoption of bio-based feedstocks, and innovative methodologies. Water-based adhesives are affordable and can be applied through various methods, making them popular in the region.

## 2. Asia Pacific

The Asia Pacific region is poised for rapid growth in the packaging adhesives market during the forecast period. This growth is attributed to shifting lifestyles, rising disposable incomes, and a growing population, particularly in China and India. The region's expanding production of packaged food and beverages is expected to contribute significantly to market growth. China, in particular, is a rapidly growing market within the region and the largest adhesive producer in Asia Pacific. The increasing number of hospitals and healthcare facilities, driven by the growing geriatric population, is expected to boost pharmaceutical production, thereby increasing the utilization of packaging adhesives in pharmaceutical packaging.

### Key Market Players

3M Co.

Arkema Group (Bostik)

Avery Dennison Corporation

Ashland Inc

Dow Chemical Company

Henkel AG & Co. KGaA

H.B. Fuller Company

Jowat SE

Paramelt RMC B.V.

Wacker Chemie AG

## Report Scope:

In this report, the Global Packaging Adhesives Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

### Packaging Adhesives Market, By Technology:

Water-based

Solvent-Based

Hot Melt

Others

### Packaging Adhesives Market, By Resins:

PVA

Acrylics

Polyurethane

Others

### Packaging Adhesives Market, By Application:

Cases & Carton

Corrugated Packaging

Labeling

Flexible Packaging

Folding Cartons

Speciality Packaging

Others

### Packaging Adhesives Market, By Region:

Asia-Pacific

China

India

Australia

Japan

South Korea

Europe

France

Germany

Spain

Italy

United Kingdom

North America

United States

Mexico

Canada

South America



Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Packaging Adhesives Market.

Available Customizations:

Global Packaging Adhesives Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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