

Packaging Adhesives - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

Packaging Adhesives Market Analysis

The Packaging Adhesives Market size is estimated at USD 20.71 billion in 2025, and is expected to reach USD 27.44 billion by 2030, at a CAGR of 5.79% during the forecast period (2025-2030). Growth rests on four pillars: rising volumes of ready-to-eat food, an e-commerce boom that prioritizes tamper-evident sealing, regulatory pressure on volatile organic compound (VOC) emissions, and rapid uptake of bio-based chemistries. Water-based formulations command more than half of all revenue because they meet tightening air-quality rules without compromising bond strength, while hot-melt lines keep gaining share in automated fulfillment centers that demand quicker line speeds. Regionally, Asia-Pacific benefits from manufacturing scale and public-sector investment in recycling infrastructure, North America monetizes process innovation, and Europe enforces circular-economy rules that lift demand for repulpable or compostable grades. Competitive intensity stays moderate as large chemical producers use acquisitions, joint R&D, and scope-3 carbon targets to differentiate in an otherwise price-sensitive landscape.

Global Packaging Adhesives Market Trends and Insights

Growing Demand from the Food & Beverage Sector

Demand for barrier integrity and extended shelf life keeps the packaging adhesives market aligned with new product launches in beverages, dairy, and ready meals. Producers now specify migration-tested grades that pass multi-regional rules while running at lower line temperatures to save energy. Henkel's bio-based Technomelt Supra 079 Eco Cool, commercialized in 2024, contains

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49% renewable content and cuts operating heat by 40 C, which translates to 32% lower CO₂ emissions and seamless recyclability with paper fibers. Similar energy-saving profiles help large bottlers achieve public climate milestones.

Increasing Awareness of Food Safety

Global regulators are closing loopholes in indirect-food-contact approvals. China's GB 4806.15-2024 introduces positive lists for 392 adhesive substances, mandatory labeling, and migration limits that apply on 8 February 2025. In parallel, the U.S. Food & Drug Administration phased out PFAS grease-proofing chemistries in early 2024, compelling converters to qualify non-fluorinated alternatives. The resulting compliance burden spurs multi-regional adhesive formulations that simplify documentation across export markets.

Stringent Government Regulations

VOC caps continue to tighten. New Jersey's 2024 draft lowers allowable VOCs in consumer adhesives to 7%, while California's rulebook bans 47 toxic air contaminants outright. European Union Regulation 2024/3190 removes Bisphenol A from food packaging, driving formulators to water-based or UV-cured alternatives. Compliance costs rise, yet early adopters gain pricing power through certified low-emission labels.

Other drivers and restraints analyzed in the detailed report include:

Technological Advances in Adhesive Chemistry / E-Commerce Packaging Requirements / Fluctuating Raw Material Prices /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Water-based systems held a 57.19% share of the packaging adhesives market in 2024 on revenue terms, reflecting converters' need to meet zero-solvent production targets. This dominance will expand at a 6.04% CAGR, far ahead of solvent-borne analogues. Fast-drying acrylic dispersions now bond multilayer films at room temperature, lowering oven dwell times. In parallel, upgraded rheology modifiers preserve bead shape on high-speed slot coaters, elevating throughput without adding stabilizers. Hot-melt chemistries rank a close second because warehouse automation favors instant set-up; innovations such as renewable-sourced polyolefin backbones shrink the carbon gap with water-based peers.

Stringent rules across Europe and North America guarantee demand longevity. As upcoming OECD guidelines quantify life-cycle emissions, brand owners lock in suppliers that disclose plant-level emissions data. Consequently, water-based lines are positioned to supply both mass-market corrugate and premium flexible laminates, reinforcing the packaging adhesives market size advantage of technology leaders through 2030. Solvent-based players will still serve niche high-temperature applications but face gradual erosion unless they reformulate toward ultra-low VOC blends.

EVA accounted for 30.51% of the packaging adhesives market size in 2024, underpinned by favorable cost-to-performance ratios and compatibility with diverse substrates. Its role in carton sealing, magazine spine gluing, and tamper-evident labeling sustains high volumes. To counter thermal sensitivity drawbacks, suppliers now blend metallocene polyethylene segments for stronger hot-tack, safeguarding margins as resin prices swing. Bio-based grades, although smaller in volume, are on track for a 6.71% CAGR as sugar-cane-derived monomers scale. Bostik's 60% bio-content cyanoacrylate line brings instant adhesion to high-value packages while cutting greenhouse-gas footprints, a template other majors aim to replicate.

Investor scrutiny of scope-3 disclosures speeds the transition. Multinationals with science-based targets screen vendors for on-site

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renewable energy and mass-balance certification, reallocating volume toward bio-based innovators. In parallel, acrylics and polyurethanes remain indispensable where chemical resistance or flexibility is vital, maintaining mid-single-digit growth. Collectively, this chemistry mix ensures the packaging adhesives market remains both competitive and innovation-rich.

The Packaging Adhesives Market Report Segments the Industry by Technology (Water-Based, Solvent-Based, and Hot-Melt), Resin Chemistry (Acrylics, Polyurethanes, and More), Application (Flexible Packaging, Folding Cartons and Boxes, and More), End-Use Industry (Food and Beverage, Pharmaceuticals and Healthcare, and More), and Geography (Asia-Pacific, North America, Europe, South America, and Middle East and Africa).

Geography Analysis

Asia-Pacific dominated 2024 revenue with a 40.19% stake in the packaging adhesives market and is set to advance at the highest 6.51% CAGR. Chinese converters invest in high-speed lamination to keep pace with single-serve beverage launches, while Indian corrugators add water-based coating lines to tap regional fulfilment hubs. Japan's brand owners innovate barrier films for ready-to-eat bento boxes, creating demand for low-migration polyurethane dispersions that cure at room temperature. National packaging waste rules-such as China's 2023 mandate capping excessive wrap layers-force adhesive suppliers to engineer bonds that survive thinner substrates without delamination. Growing adoption of e-commerce across ASEAN economies adds further upside for hot-melt sticks and reinforced gummed tapes.

North America remains a trendsetter in technology adoption. The Environmental Protection Agency's purchasing framework references over 40 private ecolabels, steering federal agencies toward low-VOC and recycled-content packs. This shifts demand toward water-based and bio-based grades across envelope closures and military meal kits. Large-scale carton makers in the United States now trial mass-balance EVA derived from tall-oil feedstocks, aiming to show measurable carbon reductions in customer scorecards. Canada's 2021-2028 VOC reduction agenda targets industrial adhesives next, pushing local formulators to accelerate solvent replacement.

Europe remains the regulatory bellwether, with the ban on Bisphenol A in food contact materials under Regulation 2024/3190 setting a new baseline for indirect-food-contact adhesives. Germany's DIN CERTCO certifies compostable laminates, while France's AGEC law drives mono-material flexible packs that still require ultra-thin tie layers. Eastern European plants leverage this shift to compete for contract manufacturing as Western brands rationalize capacity. South America, led by Brazil, exhibits solid mid-single-digit growth because grocery chains extend private-label snack lines that use sachets sealed with hot-melt EVA blends. Although smaller, the Middle East and Africa witness rising demand in Saudi Arabia's dairy sector and South Africa's fruit export operations, opening space for moisture-cure polyurethane hot melts that handle cold-chain logistics.

Collectively, geographic diversification cushions the packaging adhesives market from localized downturns. Suppliers blending global regulatory intelligence with localized technical service capture outsized value by formulating halal-compliant raw materials for Gulf markets or tuning tackifiers for sub-equatorial humidity levels.

List of Companies Covered in this Report:

3M / Arkema / Ashland / Avery Dennison Corporation / Dow / Dymax / Franklin International / H.B. Fuller Company / Henkel AG & Co. KGaA / Jowat SE / Paramelt / Sonoco Products Company / Synthomer plc / Wacker Chemie AG /

Additional Benefits:

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Table of Contents:

1 Introduction

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 Research Methodology

3 Executive Summary

4 Market Landscape

4.1 Market Overview

4.2 Market Drivers

4.2.1 Growing Demand from the Food and Beverage Industry

4.2.2 Increasing Awareness for Food Safety

4.2.3 Technological Advancements in Adhesive Formulations

4.2.4 Growing Demand from the E-commerce industry

4.2.5 Expansion of Retail and Consumer Goods Sector

4.3 Market Restraints

4.3.1 Stringent Government Regulations

4.3.2 Fluctuations in Raw Material Prices

4.3.3 Concerns of VOC Emissions

4.4 Value Chain Analysis

4.5 Porter's Five Forces

4.5.1 Bargaining Power of Suppliers

4.5.2 Bargaining Power of Buyers

4.5.3 Threat of New Entrants

4.5.4 Threat of Substitutes

4.5.5 Competitive Rivalry

5 Market Size and Growth Forecasts (Value)

5.1 By Technology

5.1.1 Water-based

5.1.2 Solvent-based

5.1.3 Hot-Melt

5.2 By Resin Chemistry

5.2.1 Acrylics

5.2.2 Polyurethanes

5.2.3 Ethylene-Vinyl Acetate (EVA)

5.2.4 Styrenic Block Copolymers

5.2.5 Natural/Bio-based

5.3 By Application

5.3.1 Flexible Packaging

5.3.2 Folding Cartons and Boxes

5.3.3 Labels and Tapes

5.3.4 Sealing

5.3.5 Other Applications (Tissue and Towel Over-wrap, Graphics and Specialty)

5.4 By End-Use Industry

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- 5.4.1 Food and Beverage
- 5.4.2 Pharmaceuticals and Healthcare
- 5.4.3 Personal Care and Cosmetics
- 5.4.4 Industrial and Consumer Goods
- 5.4.5 E-Commerce Retail Fulfilment
- 5.5 By Geography
 - 5.5.1 Asia-Pacific
 - 5.5.1.1 China
 - 5.5.1.2 India
 - 5.5.1.3 Japan
 - 5.5.1.4 South Korea
 - 5.5.1.5 ASEAN Countries
 - 5.5.1.6 Rest of Asia-Pacific
 - 5.5.2 North America
 - 5.5.2.1 United States
 - 5.5.2.2 Canada
 - 5.5.2.3 Mexico
 - 5.5.3 Europe
 - 5.5.3.1 Germany
 - 5.5.3.2 United Kingdom
 - 5.5.3.3 France
 - 5.5.3.4 Italy
 - 5.5.3.5 Rest of Europe
 - 5.5.4 South America
 - 5.5.4.1 Brazil
 - 5.5.4.2 Argentina
 - 5.5.4.3 Rest of South America
 - 5.5.5 Middle East and Africa
 - 5.5.5.1 Saudi Arabia
 - 5.5.5.2 South Africa
 - 5.5.5.3 Rest of Middle East and Africa

6 Competitive Landscape

- 6.1 Market Concentration
- 6.2 Strategic Moves
- 6.3 Market Share(%) / Ranking Analysis
- 6.4 Company Profiles (includes Global Level Overview, Market Level Overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share, Products and Services, Recent Developments)
 - 6.4.1 3M
 - 6.4.2 Arkema
 - 6.4.3 Ashland
 - 6.4.4 Avery Dennison Corporation
 - 6.4.5 Dow
 - 6.4.6 Dymax
 - 6.4.7 Franklin International
 - 6.4.8 H.B. Fuller Company
 - 6.4.9 Henkel AG & Co. KGaA

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- 6.4.10 Jowat SE
- 6.4.11 Paramelt
- 6.4.12 Sonoco Products Company
- 6.4.13 Synthomer plc
- 6.4.14 Wacker Chemie AG

7 Market Opportunities and Future Outlook

7.1 White-Space and Unmet-Need Assessment

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