Sustainability pushes innovation in €2.95 billion European packaging adhesives market

Exclusive research from Smithers shows that Europe remains a key market for packaging adhesives, with a focus for innovation, especially towards greener, bio-based, and recycling friendly formulations.

Sales in the wider region will be worth $3.3 billion (€2.9 billion) in 2025, with 1.1 million tonnes of adhesives consumed, according to data from its latest market report – [The Future of Packaging Adhesives to 2030].

Sustainability is a pervasive trend across packaging design. This emphasis is increasingly expanding beyond just the base material to all components and additives, including adhesives. In the EU, this will in future be backed by regulatory requirements. The Packaging and Packaging Waste Regulation (PPWR) 2025/40 adopted in January, will create design-for-recycling criteria for all consumer packaging. The legislation specifically lists adhesives as one component these will consider.

A core element of the PPWR is ensuring recoverability of materials at end-of-life. Hence most design-for-recycling criteria are likely to prioritise washable adhesives that can detach fully from the base packaging during normal recovery operations, and do not contaminate the recyclate.

Sustainability is also pushing for innovation in raw material sourcing. Pine derivatives, vegetable oils, and starches are all renewable resources that can be converted into polyols for polyurethane systems; bio-based acetic acid and bio-ethylene which can be used in the production of polyvinyl acetate (PVAc) or vinyl acetate ethylene (VAE) dispersions; and plant-derived monomers for acrylic copolymer dispersions.

Natural resins and tackifiers extracted from wood are being used in non-reactive hot melt adhesives. Across the packaging adhesive supply chain, companies are looking to qualify their work in this sphere, with some manufacturers applying for International Sustainability & Carbon Certification (ISCC) certification as an independent verification of the level of bio-based content.

Solvent-borne and reactive systems are continuing to lose market share. Water-borne and hot-melt adhesives remain the most popular technologies in packaging, accounting for 52.6% and 31.6% respectively, of volume consumption in 2025. There is new interest in radiation-curing adhesives, these will have the fastest growth rate across the next five years, but from a low base; meaning they will remain a niche product in packaging construction.

These material splits are largely reproduced across Europe, with the move away from solvent-and reactive formulations more advanced in its most developed economies. The demand for waterborne adhesives in Western Europe shrank slightly over the five years since 2020, largely due to a dip in demand in 2022 and 2023 due to economic impacts of the war in Ukraine. In contrast, hot-melt sales were more resilient, mainly due to increased sales into e-commerce delivery formats.

Hot melts will also account for the majority of incremental growth over the next five years. This will include more bio-based ingredients and wider adoption of polyolefin hot melts, to optimise the recovery of polypropylene and polyethylene packs at end-of-life

The Future of Packaging Adhesives to 2030 from Smithers analyses and quantifies the European and global market. This includes a comprehensive data set segmenting the industry by adhesive type, packaging formats, geographic region, and leading national market.

Smithers is pleased to offer FEICA members a 15% discount on the report. For more information, please visit https://www.smithers.com/en-gb/services/market-reports/packaging/the-future-of-adhesives-for-packaging-to-2030 and use code FEICA15

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