

Active and Intelligent Packaging Market - Global Outlook and Forecast 2019-2024

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Abstracts

The global active and intelligent packaging market is expected to grow at a CAGR of more than 4% during 2018–2024.

The increased use of anti-microbial packaging agents as a mechanism to maintain safety and preserve the quality of food items for a longer duration is one of the major factor driving the global active and intelligent packaging market. The increasing usage of RFID and barcodes in industrial setups to streamline the supply chain process is one of the major factors for the rise of intelligent packaging solutions. Therefore, the inclusion of additional features/functionalities such as providing information for the integrity of the package and quality of the contents stored in the package throughout the logistics will accelerate the demand for RFID packaging solutions.

The edible coating on food products is a new technology driving the active packaging industry. It is highly used to pack frozen and chilled food products. The high demand for frozen food products in North America and Europe is a major key factor fueling the growth of active packaging market. Active packaging has a large share in the global packaging market, as it requires low investments. Further, active packaging has a better growth rate than intelligent packaging in developing countries, as it is more inexpensive than smart packaging. Further, with the increase in smartphone penetration worldwide, the demand for interactive intelligent packaging is expected to rise. Africa and APAC are expected to be major markets for authentication-based intelligent packaging solutions as established pharmaceutical and food vendors are aiming to expand the scope and scale of their businesses in these regions.

The following factors are likely to contribute to the growth of the global active and intelligent packaging market during the forecast period:

Active packaging through an edible coating

Use of natural anti-microbial agents

Growth of nanotechnology in intelligent packaging

Growth of anti-microbial packaging

Increase in product counterfeiting

This market research report on the active and intelligent packaging market offers analysis on market size & forecast, market share, industry trends, growth drivers, and vendor analysis. The market study also includes insights on segmentation by application (food, beverages, healthcare, and others), active packaging system type (gas scavengers, moisture control system, microwave susceptors, and others), intelligent packaging system type (interactive packaging, indicators, and sensors), by geography (APAC, Europe, North America, Latin America, and MEA).

The study considers the present scenario of the active and intelligent packaging market dynamics for the period 2018-2024. The study covers a detailed overview of various market growth enablers, restraints, and trends. The study covers both the demand and supply sides of the market. The study also profiles and analyzes the leading companies and other prominent companies operating in the active and intelligent packaging market.

Active and Intelligent Packaging Market: Segmentation

This research report includes detailed market segmentation by application, active packaging system type, intelligent packaging system type, and geography. The food sector is the major end-user in the active and intelligent packaging market. The need to extend the shelf life of processed and packaged fresh foods is driving the demand for active and intelligent packaging materials in the food segment. However, the demand for active packaging market is comparatively higher than intelligent packaging solutions due to the accessibility of food products at rational rates using active packaging. The active and intelligent packaging market by the beverage sector is growing in the form of labels. Further, interactive packaging is more prevalent in the beverage industry. The adoption of active and intelligent packaging is becoming popular in the pharmaceutical industry. The compliance with the FDA regulation in terms of packaging materials is

driving the demand for the pharmaceutical packaging market. Changing consumer behavior, which focuses on connectivity and product information, is likely to lead the adoption of advanced active and intelligent packaging. The other application areas of active and intelligent packaging market include personal care, pet food, household products, and other non-food categories. The cosmetic industry is expected to have a positive impact on the market.

The need to extend shelf life and maintain high-quality of food items is boosting the active packaging market. Sachets and labels dominate the active packaging segment. The ease of procurement and abundance of active ingredients makes active packaging an attractive option among brands. The market for external gas component (gas scavengers) is gaining ground due to the low cost and does not require any change in the production line. Commercially, oxygen scavengers are most widely used in the active packaging market. With the growing concerns over metallic elements coming in contact with food items, non-metallic oxygen scavengers are gaining prominence. The market for microwave susceptors is expected to grow at a healthy rate during the forecast period as susceptors can be temperature-controlled to speed up and improve the product texture.

The food packaging market is introducing less toxic content such as the biologically sourced polysaccharide-based films, which is likely to fuel the active and intelligent packaging market during the forecast period.

The growing consciousness among European and North American brands to adopt the technology that reduces food wastage, improves food taste, and increases shelf life of processed food products is a major contributing factor to the intelligent packaging market. The market for interactive packaging is growing as consumers loyalty programs require value-added features to retain customers. Further, with counterfeit medicines estimated to be 10% to 15% of the overall drug output, the benefit of using NFC in conjunction with smartphones have made the pharmaceutical industry as one of the high potential markets for vendors. Cost-effectiveness and easy application of indicators are major reasons for their application in the smart packaging market.

Market Segmentation by Applications

Food

Beverages

Healthcare

Others

Market Segmentation by Active Packaging System Type

Gas Scavengers

Moisture Control System

Microwave Susceptors

Others

Market Segmentation by Intelligent Packaging System Type

Interactive Packaging

Indicators

Sensors

Active and Intelligent Packaging Market: Geography

The high demand for active gas scavengers and emitters across industries is driving the active and intelligent packaging market in APAC. The growing retail landscape, along with organized packaging, is further boosting the market in the region. The high penetration of the internet and the rise of e-commerce are expected to boost the active and intelligent packaging market in APAC during the forecast period. The growth trend for active and intelligent packaging market in Europe is expected to be faster in the second half of the forecast period, as the market is likely to gain some clarity over the Brexit. The demand for interactive packaging is high in Western Europe. Further, the UK, Spain, and Italy are the highest revenue contributors, witnessing substantial growth in the active and intelligent packaging market.

The active and intelligent packaging market in North America is growing at a healthy

rate due to high volume consumption and value generation potential. Factors such as the availability of raw materials for active and intelligent packaging, the presence of technologically advanced ecosystems, and less complex nature of regulations are driving the market in the region. Modern retail stores in the Middle East offer high potential for brands to incorporate intelligent packaging as the region has one of the highest GDPs per capita. Investments in food processing, especially meat and poultry in the UAE have positively impacted the active and intelligent packaging market

Market Segmentation by Geography

APAC

China

Japan

Australia

India

South Korea

Singapore

Europe

Germany

France

UK

Italy

Spain

Turkey

North America

US

Canada

Latin America

Argentina

Brazil

Chile

Colombia

Mexico

MEA

Saudi Arabia

South Africa

Egypt

UAE

Key Vendor Analysis

The active and intelligent packaging market is highly fragmented with no clear global leader providing a full portfolio of products and services. It is characterized by the presence of diversified companies at local, regional, and international levels. Vendors in the market are invested mostly in smart packaging solutions for intelligent packaging as they provide better cost on investment and are more efficient with their functionalities. Many new vendors both in active and intelligent packaging have come into existence with a focus on single product specialization. The active packaging market will see the high level of competition at the local or regional level as it does not require huge capital investment and patents, unlike the intelligent packaging, where packaging and

technological company have to collaborate.

Key Vendors

Avery Dennison

DuPont

Stora Enso

Timestrip

Thinfilm Electronics

Other Prominent Vendors

Ancor

Sonoco Thermosafe

Sealed Air

Westrock

Mitsubishi Gas Chemical

Tropack Packmittal GmbH

Cryolog

Crown

Graphic Packaging

TC Transcontinental

Desiccare

Key Market Insights

The analysis of the global active and intelligent packaging market provides market sizing and growth opportunities for the forecast period 2019–2024.

Offers market sizing and growth prospects of the global active and intelligent packaging market for the forecast period 2019–2024.

Provides comprehensive insights on the latest industry trends, market forecast, and growth drivers in the global active and intelligent packaging market.

Includes a detailed analysis of active and intelligent packaging market growth drivers, challenges, and investment opportunities.

Delivers a complete overview of market segments and the regional outlook of the active and intelligent packaging market.

Offers an exhaustive summary of the vendor landscape, competitive analysis, and key market strategies to gain a competitive advantage in the global active and intelligent packaging market.

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