

Flexible Packaging Market - Global Outlook and Forecast 2021-2026

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global Flexible Packaging Market Report

The flexible packaging market by revenue is expected to grow at a CAGR of over 4% during the period 2021–2026.

The global flexible packaging market is likely to experience growth due to the increased adoption of blister plastic films, aluminum foils, and pouches in the pharmaceutical industry. The wide adoption of blister material, replacing the glass and rigid plastics, has resulted in the high application of lidding films. Paper and plastic films are widely used in blister packs, followed by aluminum foil because of their cost-efficiency. New and advanced blister machinery can pack anywhere between 900 and 1,300 blister packs per minute. The US pharmaceutical packaging market is the major revenue contributor. North America is expected to have around 40–45% of the global pharmaceutical market in value and contribute to approx. 45% to the global market growth during the period 2021–2026.

The following factors are likely to contribute to the growth of the flexible packaging market during the forecast period:

Increased Focus on Sustainable Flexible Packaging

Profit Volatility in APAC Region

Usage of High-barrier Plastic Packaging Materials

Increasing Adoption of Flexible Packaging over Rigid Packaging

The study considers the present scenario of the flexible packaging market and its market dynamics for the period 2020-2026. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Global Flexible Packaging Market Segmentation

The global flexible packaging market research report includes a detailed segmentation by material, application, consumer flexible packaging end-users, product type, printing type, geography. The food industry, which accounted for over 70% of the flexible packaging market share in 2020, has majorly contributed to the flexible plastic segment. Flexible plastic materials are derived from non-renewable resources. Premium products and most food items are packaged in flexible plastic pouches fitted with closures. The food, pharmaceuticals, and beverage industries are the key application end-users of flexible plastic pouches. Pouches have observed the highest demand in flexible plastic packaging; stand-up pouches are growing at an annual rate of around 5%, as they use 60% less plastic and are convenient to use. In 2020, multi-material products garnered the highest flexible packaging market share as they were presumed to offer increased protection from viruses.

Consumer packaging accounted for a major revenue of the global flexible packaging market share in 2020. Pouches, blister packs, and strip packs are the major product categories that cater to the consumer market. The segment is expected to grow faster than industrial packing as a high percentage of industries is adopting flexible solutions, especially non-food and beverage industries. With the outbreak of the COVID-19 pandemic affecting disposable income, low demand from several end-user segments is expected for a short period. However, healthcare and F&B industries are expected to boost the demand. In the personal care segment, rigid packaging is replaced by a flexible material, which is expected to increase the market growth during the forecast period.

Bakery and confectioneries are expected to contribute \$36 billion to the flexible packaging industry by 2026. China is the largest producer and consumer of bakery products globally, with an annual growth rate of 15%. The adoption of modified atmospheric packaging technology in the bakery is expected to grow during the forecast

period. Single-serving and smaller-size packs will witness high application in bakery packing.

Flexible bags and sacks are observing application in healthcare, personal care, and pet food. Although pouches' demand is growing as diverse industries adopt them, plastic bags' volume is more substantial. Plastic bags are in high demand in several European countries. In 2020, several companies started producing bioplastic bags due to the demand for sustainable packaging. However, due to COVID-19, there has been a shift toward plastic, thereby increasing revenue for plastic bags and sacks. Plastic bags and sacks provide high storage advantages, improve logistics, and are cost-effective. However, the disruption in the supply chain for plastic and the paper raw material is expected to affect the production of flexible bags and sacks in the short term.

Flexographic printing is expected to grow on account of increased demand from APAC countries during the forecast period. The increased demand for labels and flexible packaging is driving flexographic printing. Further, enhancements in quality and reduced run lengths are boosting the market growth. The breakout of the COVID-19 pandemic declined the demand for flexographic printing in the packaging market in North America, Australia, Asia, and Western Europe. The increasing awareness of sustainable packing is likely to influence the market for flexographic. However, fluctuations in crude oil prices, which affect polymers and resins' production, are likely to hamper the flexographic segment growth. Rotogravure printing is extensively used to print packaging products such as polythene packs, soap wrappers, bread wrappers, milk pouches, and other materials.

Material

Flexible Plastic

PE

BOPP

CPP

BOPET

PA

PET

PVC

EVOH

Others

Flexible Paper

Foil

Application

Consumer Packaging

Industrial Packaging

Consumer Flexible Packaging End-users

Bakery & Confectionery

Meat, Poultry & Seafood

Dairy

RTE

Frozen Food

Tea & Coffee

Petfood

Healthcare

Personal Care

Other End-users

Product Type

Bags and Sacks

Pouches

Others

Printing Type

Flexography

Rotogravure and Others

INSIGHTS BY GEOGRAPHY

The pharmaceuticals market in China has been one of the continually growing sectors in recent years. The pharmaceuticals market is estimated to reach USD 161 billion by 2023. Therefore, this significant growth is expected to drive the demand for packaging machinery during the forecast period. Japan is expected to offer high growth opportunities for flexible packing material due to the high population over 65 years. This category of people prefers easy-to-use, ready-to-eat, and convenient food packaging, increasing the usage of flexible materials. The growth of e-commerce has increased the demand for corrugated boxes, flexible plastic protective packings, paper protective packaging, bubble wrappings, and void fill plastic packaging. India and China are expected to witness the highest growth in the APAC pharmaceutical industry. Post-COVID, several end-user industries are expected to revive in the region, thereby driving the demand significantly.

By Geography

North America

US

Canada

Europe

UK

Germany

France

Spain

Italy

Benelux

Austria

Scandinavia

Rest of Europe

APAC

China

Japan

South Korea

India

Australia

New Zealand

Rest of APAC

Latin America

Brazil

Mexico

Argentina

Chile

Rest of Latin America

Middle East & Africa

Saudi Arabia

South Africa

UAE

Turkey

Rest of Middle East & Africa

INSIGHTS BY VENDORS

Small and medium-sized enterprises constitute a significant segment of the flexible packaging market. Larger players have been aggressively adopting an inorganic growth strategy to expand their operations. They have technological strength and high-volume product lines that have helped offset cost variations. Small companies focus on customization as the market competition is mainly based on two aspects – features and price. The niche segment that does not have large volume is primarily dependent on small companies. The market has witnessed a rise in M&A activities in the last few years; the consolidation is expected to grow, especially in Europe.

Prominent Vendors

Amcor

Berry Global

Mondi

Sealed Air

TC Transcontinental Packaging

Sonoco

Huhtamaki

Constantia Flexibles

Ahlstrom-Munksj?

Greif

Westrock

Smurfit Kappa

Aluflexpack (AFP)

Aptar

Other Prominent Vendors

Alinvest

Aran Group

Aluberg

American Packaging Corporation

Bischof + Klein

Bioplast

Carcano Antonio S.p.A

Danaflex

Printpack

ProAmpac

Wipak Group

Saica Flex

Etapak (Bask? Ambalaj)

Innovia Films

UFlex

International Paper

Reynolds Group

Novolex

Sigma Plastics

Glenroy

Symetal

Krajc?r Packaging

ITP

Gascoigne Flexible

Schur Flexibles

Schmid Folien

RKW Group

Pouch Partners

Perlen Packaging

Goglio Packaging

Kleiner Flexible Packaging

Winpak

Stora Enso

Global-Pak

Di Mauro

Eurofoil

Gerosa Group

LEEB Flexibles

PolyPak

Pro-Pac Packaging (PPG)

Walki Group

Wipf

WZ Packaging Limited

KEY QUESTIONS ANSWERED

1. What is the growth rate of the flexible packaging market during the period 2021–2026?
2. How does the pharmaceutical industry boost the demand for flexible packaging?
3. What major opportunities exist for new entrants in the market?
4. Which is the largest end-user segment in the global flexible packaging market?
5. What are the latest trends witnessed in the flexible plastic packaging market?

Contents

1 RESEARCH METHODOLOGY

2 RESEARCH OBJECTIVES

3 RESEARCH PROCESS

4 SCOPE & COVERAGE

4.1 Market Definition

4.1.1 Inclusions

4.1.2 Exclusions

4.2 Base Year

4.3 Scope of The Study

4.3.1 Market Segmentation by Material

4.3.2 Market Segmentation by Application

4.3.3 Market Segmentation by Consumer Flexible Packaging End-users

4.3.4 Market Segmentation by Flexible Packaging Product Type

4.3.5 Market Segmentation by Printing Type

4.3.6 Market Segmentation by Geography

5 REPORT ASSUMPTIONS & CAVEATS

5.1 Key Caveats

5.1 Currency Conversion

5.2 Market Derivation

6 MARKET AT A GLANCE

7 INTRODUCTION

7.1 Overview

7.1.1 Flexible Plastic Packaging

7.1.2 Food & Beverages

7.1.3 Pouches

7.1.4 Key Strategies of Market Vendors

7.1.5 Major Highlights

7.1.6 MegaTrends

7.2 Key Insights

7.2.1 Raw Material

7.2.2 Pricing

7.3 Impact Of COVID-19

7.3.1 Packaging Sector 2020

7.3.2 Post-COVID-19 Highlights

7.3.3 Impact on Flexible Packaging Supply Chain

7.3.4 Pharmaceutical Packaging

8 MARKET OPPORTUNITIES & TRENDS

8.1 Increased Focus on Sustainable Flexible Packaging

8.2 Profit Volatility In APAC Region

8.3 Increasing Use Of High-Barrier Plastic Packaging Materials

8.4 Increasing Adoption Of Flexible Packaging

8.5 Growth in e-Commerce Industry

9 MARKET GROWTH ENABLERS

9.1 Increasing Demand from Healthcare Industry

9.2 Demand for Lightweight Products

9.3 Increasing Demand For Pouch Packaging

9.4 Increasing Consumption Of Processed And Packaged Food

9.5 Increase in Shelf Life

10 MARKET RESTRAINTS

10.1 Recycling Challenges With Flexible Packaging Products

10.2 Higher Operational Cost

10.3 Fragmented Marketplace

10.4 Rising Raw Material Costs

10.5 Slow Economic Growth In 2020

11 MARKET LANDSCAPE

11.1 Market Overview

11.1.1 Geographic Insights

11.1.2 Flexible Plastic: Market Dynamics

11.1.3 Flexible Paper: Market Dynamics

- 11.1.4 Flexible Foils: Market Dynamics
- 11.2 Market Size & Forecast
- 11.3 Market By Product Type
- 11.4 Market By Application Type
- 11.5 Market By Material Type
- 11.6 Market By Consumer Flexible Packaging End-User
- 11.7 Market By Flexible Plastic
- 11.8 Market By Printing
- 11.9 Five Forces Analysis
 - 11.9.1 Threat of New Entrants
 - 11.9.2 Bargaining Power of Suppliers
 - 11.9.3 Bargaining Power of Buyers
 - 11.9.4 Threat of Substitutes
 - 11.9.5 Competitive Rivalry

12 MATERIAL

- 12.1 Market Snapshot & Growth Engine
- 12.2 Market Overview
 - 12.2.1 Flexible Plastic
 - 12.2.2 Flexible Paper
 - 12.2.3 Foil
- 12.3 Flexible Plastic
 - 12.3.1 Market Size & Forecast by Value
 - 12.3.2 Market by Geography
 - 12.3.3 PE (Polyethylene): Market Size & Forecast by by Volume
 - 12.3.4 BOPP (Biaxially Oriented Polypropylene): Market Size & Forecast by Volume
 - 12.3.5 CPP (Cast Polypropylene): Market Size & Forecast by Volume
 - 12.3.6 BOPET (Biaxially-oriented Polyethylene Terephthalate): Market Size & Forecast by Volume
 - 12.3.7 PA (Polyamide): Market Size & Forecast by Volume
 - 12.3.8 PET (Polyethylene Terephthalate): Market Size & Forecast by Volume
 - 12.3.9 PVC (Polyvinyl Chloride): Market Size & Forecast by Volume
 - 12.3.10 EVOH (Ethylene-Vinyl Alcohol): Market Size & Forecast by Volume
 - 12.3.11 Others: Market Size & Forecast by Volume
- 12.4 Flexible Paper
 - 12.4.1 Market Size & Forecast
 - 12.4.2 Market By Geography
- 12.5 Foil

12.5.1 Market Size & Forecast

12.5.2 Impact of COVID-19

12.5.3 Market by Geography

13 APPLICATION

13.1 Market Snapshot & Growth Engine

13.2 Market Overview

13.2.1 Post-COVID Scenario

13.2.2 Raw Material Insights

13.3 Consumer Packaging

13.3.1 Market Size & Forecast

13.3.2 Impact of COVID-19

13.3.3 Market by Geography

13.4 Industrial Packaging

13.4.1 Market Size & Forecast

13.4.2 Impact of COVID-19

13.4.3 Market by Geography

14 CONSUMER FLEXIBLE PACKAGING END-USER

14.1 Market Snapshot & Growth Engine

14.2 Market Overview

14.2.1 F&B (Bakery & Confectionery, Dairy, Meat, poultry & seafood, RTE, Frozen Food, Tea & Coffee and others)

14.2.2 Healthcare

14.2.3 Personal Care

14.2.4 Petfood

14.3 Bakery & Confectionery

14.3.1 Market Size & Forecast

14.3.2 Impact of COVID-19

14.3.3 Market by Geography

14.4 Meat, Poultry, & Seafood

14.4.1 Market Size & Forecast

14.4.2 Impact of COVID-19

14.4.3 Market by Geography

14.5 Dairy

14.5.1 Market Size & Forecast

14.5.2 Impact of COVID-19

- 14.5.3 Market by Geography
- 14.6 RTE
 - 14.6.1 Market Size & Forecast
 - 14.6.2 Impact of COVID-19
 - 14.6.3 Market by Geography
- 14.7 Healthcare
 - 14.7.1 Market Size & Forecast
 - 14.7.2 Impact of COVID-19
 - 14.7.3 Market by Geography
- 14.8 Frozen Food
 - 14.8.1 Market Size & Forecast
 - 14.8.2 Impact of COVID-19
 - 14.8.3 Market by Geography
- 14.9 Tea & Coffee
 - 14.9.1 Market Size & Forecast
 - 14.9.2 Impact of COVID-19
 - 14.9.3 Market by Geography
- 14.10 Personal Care
 - 14.10.1 Market Size & Forecast
 - 14.10.2 Impact of COVID-19
 - 14.10.3 Market by Geography
- 14.11 Petfood
 - 14.11.1 Market Size & Forecast
 - 14.11.2 Demand Insights in COVID-19
 - 14.11.3 Market by Geography
- 14.13 Others
 - 14.13.1 Market Size & Forecast
 - 14.13.2 Market by Geography

15 PRODUCT TYPE

- 15.1 Market Snapshot & Growth Engine
- 15.2 Market Overview
 - 15.2.1 Bags & Sacks
 - 15.2.2 Pouches
- 15.3 Bags & Sacks
 - 15.3.1 Market Size & Forecast
 - 15.3.2 Impact of COVID-19
 - 15.3.3 Market by Geography

15.4 Pouches

15.4.1 Market Size & Forecast

15.4.2 Impact of COVID-19

15.4.3 Market by Geography

15.5 Other Product Types

15.5.1 Market Size & Forecast

15.5.2 Impact of COVID-19

15.5.3 Market by Geography

16 PRINTING

16.1 Market Snapshot & Growth Engine

16.2 Market Overview

16.2.1 Regional Insights

16.3 Flexographic Printing

16.3.1 Market Size & Forecast by Volume

16.3.2 Impact of COVID-19

16.4 Rotogravure Printing And Others

16.4.1 Market Size & Forecast by Volume

16.4.2 Impact of COVID-19

17 GEOGRAPHY

17.1 Market Snapshot & Growth Engine

17.2 Geographic Overview

18 APAC

18.1 Market Overview

18.1.1 Key Insights

18.1.2 Regional Outlook

18.1.3 Raw Material Highlights

18.2 Market Size & Forecast

18.3 Material

18.3.1 Market Size & Forecast

18.4 Product

18.4.1 Market Size & Forecast

18.5 Application

18.5.1 Market Size & Forecast

18.6 Consumer Flexible Packaging Market By End-User

18.6.1 Market Size & Forecast

18.7 Key Countries

18.8 China

18.8.1 Market Size & Forecast

18.8.2 Impact of COVID-19

18.8.3 Material: Market Size & Forecast

18.8.4 Product: Market Size & Forecast

18.8.5 Application: Market Size & Forecast

18.8.6 Consumer Flexible Packaging Market By End-User: Market Size & Forecast

18.9 India

18.9.1 Market Size & Forecast

18.9.2 Impact of COVID-19

18.9.3 Material: Market Size & Forecast

18.9.4 Product: Market Size & Forecast

18.9.5 Application: Market Size & Forecast

18.9.6 Consumer Flexible Packaging Market By End-User: Market Size & Forecast

18.10 Australia

18.10.1 Market Size & Forecast

18.10.2 Impact of COVID-19

18.10.3 Material: Market Size & Forecast

18.10.4 Product: Market Size & Forecast

18.10.5 Application: Market Size & Forecast

18.10.6 Consumer Flexible Packaging Market By End-User: Market Size & Forecast

18.11 Japan

18.11.1 Market Size & Forecast

18.11.2 Impact of COVID-19

18.11.3 Material: Market Size & Forecast

18.11.4 Product: Market Size & Forecast

18.11.5 Application: Market Size & Forecast

18.11.6 Consumer Flexible Packaging Market By End-User : Market Size & Forecast

18.12 South Korea

18.12.1 Market Size & Forecast

18.12.2 Impact of COVID-19

18.12.3 Material: Market Size & Forecast

18.12.4 Product: Market Size & Forecast

18.12.5 Application: Market Size & Forecast

18.12.6 Consumer Flexible Packaging Market By End-User: Market Size & Forecast

18.13 New Zealand

- 18.13.1 Market Size & Forecast
- 18.13.2 Impact of COVID-19
- 18.13.3 Material: Market Size & Forecast
- 18.13.4 Product: Market Size & Forecast
- 18.13.5 Application: Market Size & Forecast
- 18.13.6 Consumer Flexible Packaging Market By End-User: Market Size & Forecast
- 18.14 Rest Of APAC
 - 18.14.1 Market Size & Forecast
 - 18.14.2 Material: Market Size & Forecast
 - 18.14.3 Product: Market Size & Forecast
 - 18.14.4 Application: Market Size & Forecast
 - 18.14.5 Consumer Flexible Packaging Market By End-User: Market Size & Forecast

19 EUROPE

- 19.1 Market Overview
 - 19.1.1 Demand Factors
 - 19.1.2 Key Insights
 - 19.1.3 Plastic Pouch Driven Growth
 - 19.1.4 Impact of COVID-19
- 19.2 Market Size & Forecast
- 19.3 Material
 - 19.3.1 Market Size & Forecast
- 19.4 Product
 - 19.4.1 Market Size & Forecast
- 19.5 Application
 - 19.5.1 Market Size & Forecast
- 19.6 Consumer Flexible Packaging Market By End-User
 - 19.6.1 Market Size & Forecast
- 19.7 Key Countries
- 19.8 Germany
 - 19.8.1 Market Size & Forecast
 - 19.8.2 Impact of COVID-19
 - 19.8.3 Material: Market Size & Forecast
 - 19.8.4 Product: Market Size & Forecast
 - 19.8.5 Application: Market Size & Forecast
 - 19.8.6 Consumer Flexible Packaging Market By End-User: Market Size & Forecast
- 19.9 France
 - 19.9.1 Market Size & Forecast

- 19.9.2 Impact of COVID-19
- 19.9.3 Material: Market Size & Forecast
- 19.9.4 Product: Market Size & Forecast
- 19.9.5 Application: Market Size & Forecast
- 19.9.6 Consumer Flexible Packaging Market By End-User: Market Size & Forecast
- 19.10 UK
 - 19.10.1 Market Size & Forecast
 - 19.10.2 Impact of COVID-19
 - 19.10.3 Material: Market Size & Forecast
 - 19.10.4 Product: Market Size & Forecast
 - 19.10.5 Application: Market Size & Forecast
 - 19.10.6 Consumer Flexible Packaging Market By End-User : Market Size & Forecast
- 19.11 Italy
 - 19.11.1 Market Size & Forecast
 - 19.11.2 Impact of COVID-19
 - 19.11.3 Material: Market Size & Forecast
 - 19.11.4 Product: Market Size & Forecast
 - 19.11.5 Application: Market Size & Forecast
 - 19.11.6 Consumer Flexible Packaging Market By End-User: Market Size & Forecast
- 19.12 Benelux
 - 19.12.1 Market Size & Forecast
 - 19.12.2 Belgium
 - 19.12.3 Netherlands
 - 19.12.4 Luxembourg
 - 19.12.5 Impact of COVID-19
 - 19.12.6 Material: Market Size & Forecast
 - 19.12.7 Product: Market Size & Forecast
 - 19.12.8 Application: Market Size & Forecast
 - 19.12.9 Consumer Flexible Packaging Market By End-User: Market Size & Forecast
- 19.13 Spain
 - 19.13.1 Market Size & Forecast
 - 19.13.2 Impact of COVID-19
 - 19.13.3 Material: Market Size & Forecast
 - 19.13.4 Product: Market Size & Forecast
 - 19.13.5 Application: Market Size & Forecast
 - 19.13.6 Consumer Flexible Packaging Market By End-User: Market Size & Forecast
- 19.14 Austria
 - 19.14.1 Market Size & Forecast
 - 19.14.2 Impact of COVID-19

- 19.14.3 Material: Market Size & Forecast
- 19.14.4 Product: Market Size & Forecast
- 19.14.5 Application: Market Size & Forecast
- 19.14.6 Consumer Flexible Packaging Market By End-User: Market Size & Forecast
- 19.15 Scandinavia
 - 19.15.1 Market Size & Forecast
 - 19.15.2 Denmark
 - 19.15.3 Norway
 - 19.15.4 Sweden
 - 19.15.5 Material: Market Size & Forecast
 - 19.15.6 Product: Market Size & Forecast
 - 19.15.7 Application: Market Size & Forecast
 - 19.15.8 Consumer Flexible Packaging Market By End-User: Market Size & Forecast
- 19.16 Switzerland
 - 19.16.1 Market Size & Forecast
 - 19.16.2 Material: Market Size & Forecast
 - 19.16.3 Product: Market Size & Forecast
 - 19.16.4 Application: Market Size & Forecast
 - 19.16.5 Consumer Flexible Packaging Market By End-User: Market Size & Forecast
- 19.17 Rest Of Europe
 - 19.17.1 Market Size & Forecast
 - 19.17.2 Material: Market Size & Forecast
 - 19.17.3 Product: Market Size & Forecast
 - 19.17.4 Application: Market Size & Forecast
 - 19.17.5 Consumer Flexible Packaging Market By End-User: Market Size & Forecast

20 NORTH AMERICA

- 20.1 Market Overview
 - 20.1.1 Flexible Plastic Packaging
 - 20.1.2 F&B
- 20.2 Market Size & Forecast
- 20.3 MATERIAL
 - 20.3.1 Market Size & Forecast
- 20.4 Product
 - 20.4.1 Market Size & Forecast
- 20.5 Application
 - 20.5.1 Market Size & Forecast
- 20.6 Consumer Flexible Packaging Market By End-User

- 20.6.1 Market Size & Forecast
- 20.7 Key Countries
- 20.8 US
 - 20.8.1 Market Size & Forecast
 - 20.8.2 Impact of COVID-19
- 20.9 F&B
 - 20.9.1 Market Drivers
 - 20.9.2 Market Challenges
- 20.10 Healthcare
 - 20.10.1 Market Drivers
 - 20.10.2 Market Challenges
- 20.11 Industrial Goods
 - 20.11.1 Market Drivers
 - 20.11.2 Market Challenges
- 20.12 Personal Care
 - 20.12.1 Market Drivers
 - 20.12.2 Market Challenges
- 20.13 Petfood
 - 20.13.1 Market Drivers
 - 20.13.2 Market Challenges
- 20.14 Other End-users
 - 20.14.1 Market Drivers
 - 20.14.2 Market Challenges
- 20.15 Material
 - 20.15.1 Market Size & Forecast
- 20.16 Product
 - 20.16.1 Market Size & Forecast
- 20.17 Application
 - 20.17.1 Market Size & Forecast
- 20.18 Consumer Flexible Packaging Market By End-User
 - 20.18.1 Market Size & Forecast
- 20.19 Canada
 - 20.19.1 Market Size & Forecast
 - 20.19.2 Impact of COVID-19
 - 20.19.3 Demand Side: Impact of COVID-19
 - 20.19.4 Supply Side: Impact of COVID-19
 - 20.19.5 Material: Market Size & Forecast
 - 20.19.6 Product: Market Size & Forecast
 - 20.19.7 Application: Market Size & Forecast

20.19.8 Consumer Flexible Packaging Market By End-User: Market Size & Forecast

21 LATIN AMERICA

21.1 Market Overview

21.1.1 End-user Highlights

21.1.2 Macroeconomic factors

21.1.3 Impact of COVID-19 in Latin America

21.2 Market Size & Forecast

21.3 Material

21.3.1 Market Size & Forecast

21.4 Product

21.4.1 Market Size & Forecast

21.5 Application

21.5.1 Market Size & Forecast

21.6 Consumer Flexible Packaging Market By End-User

21.6.1 Market Size & Forecast

21.7 Key Countries

21.8 Mexico

21.8.1 Market Size & Forecast

21.8.2 Material: Market Size & Forecast

21.8.3 Product: Market Size & Forecast

21.8.4 Application: Market Size & Forecast

21.8.5 Consumer Flexible Packaging Market By End-User: Market Size & Forecast

21.9 Brazil

21.9.1 Market Size & Forecast

21.9.2 Material: Market Size & Forecast

21.9.3 Product: Market Size & Forecast

21.9.4 Application: Market Size & Forecast

21.9.5 Consumer Flexible Packaging Market By End-User: Market Size & Forecast

21.10 Argentina

21.10.1 Market Size & Forecast

21.10.2 Material: Market Size & Forecast

21.10.3 Product: Market Size & Forecast

21.10.4 Application: Market Size & Forecast

21.10.5 Consumer Flexible Packaging Market By End-User: Market Size & Forecast

21.11 Chile

21.11.1 Market Size & Forecast

21.11.2 Material: Market Size & Forecast

- 21.11.3 Product: Market Size & Forecast
- 21.11.4 Application: Market Size & Forecast
- 21.11.5 Consumer Flexible Packaging Market By End-User: Market Size & Forecast
- 21.12 Rest Of Latin America
 - 21.12.1 Market Size & Forecast
 - 21.12.2 Material: Market Size & Forecast
 - 21.12.3 Product: Market Size & Forecast
 - 21.12.4 Application: Market Size & Forecast
 - 21.12.5 Consumer Flexible Packaging Market By End-User: Market Size & Forecast

22 MIDDLE EAST & AFRICA

- 22.1 Market Overview
 - 22.1.1 Competitive Scenerio
 - 22.1.2 End-user Insights
 - 22.1.3 Impact of COVID-19
- 22.2 Market Size & Forecast
- 22.3 Material
 - 22.3.1 Market Size & Forecast
- 22.4 Product
 - 22.4.1 Market Size & Forecast
- 22.5 Application
 - 22.5.1 Market Size & Forecast
- 22.6 Consumer Flexible Packaging Market By End-User
 - 22.6.1 Market Size & Forecast
- 22.7 Key Countries
- 22.8 Turkey
 - 22.8.1 Market Size & Forecast
 - 22.8.2 Material: Market Size & Forecast
 - 22.8.3 Product: Market Size & Forecast
 - 22.8.4 Application: Market Size & Forecast
 - 22.8.5 Consumer Flexible Packaging Market By End-User: Market Size & Forecast
- 22.9 Egypt
 - 22.9.1 Market Size & Forecast
 - 22.9.2 Material: Market Size & Forecast
 - 22.9.3 Product: Market Size & Forecast
 - 22.9.4 Application: Market Size & Forecast
 - 22.9.5 Consumer Flexible Packaging Market By End-User: Market Size & Forecast
- 22.10 Saudi Arabia

- 22.10.1 Market Size & Forecast
- 22.10.2 Material: Market Size & Forecast
- 22.10.3 Product: Market Size & Forecast
- 22.10.4 Application: Market Size & Forecast
- 22.10.5 Consumer Flexible Packaging Market By End-User: Market Size & Forecast
- 22.11 South Africa
 - 22.11.1 Market Size & Forecast
 - 22.11.2 Material: Market Size & Forecast
 - 22.11.3 Product: Market Size & Forecast
 - 22.11.4 Application: Market Size & Forecast
 - 22.11.5 Consumer Flexible Packaging Market By End-User: Market Size & Forecast
- 22.12 UAE
 - 22.12.1 Market Size & Forecast
 - 22.12.2 Material: Market Size & Forecast
 - 22.12.3 Product: Market Size & Forecast
 - 22.12.4 Application: Market Size & Forecast
 - 22.12.5 Consumer Flexible Packaging Market By End-User: Market Size & Forecast
- 22.13 Rest Of Middle East & Africa
 - 22.13.1 Market Size & Forecast
 - 22.13.2 Material: Market Size & Forecast
 - 22.13.3 Product: Market Size & Forecast
 - 22.13.4 Application: Market Size & Forecast
 - 22.13.5 Consumer Flexible Packaging Market By End-User: Market Size & Forecast

23 COMPETITIVE LANDSCAPE

23.1 Competition Overview

24 KEY COMPANY PROFILES

24.1 AMCOR

- 24.1.1 Business Overview
- 24.1.2 Product Offerings
- 24.1.3 Key Strategies
- 24.1.4 Key Strengths
- 24.1.5 Key Opportunities

24.2 Berry Global

- 24.2.1 Business Overview
- 24.2.2 Product Offerings

24.2.3 Key Strategies

24.2.4 Key Strengths

24.2.5 Key Opportunities

24.3 Mondi

24.3.1 Business Overview

24.3.2 Product Offerings

24.3.3 Key Strategies

24.3.4 Key Strengths

24.3.5 Key Opportunities

24.4 Sealed Air

24.4.1 Business Overview

24.4.2 Product Offerings

24.4.3 Key Strategies

24.4.4 Key Strengths

24.4.5 Key Opportunities

24.5 TC Transcontinental

24.5.1 Business Overview

24.5.2 Product Offerings

24.5.3 Key Strategies

24.5.4 Key Strengths

24.5.5 Key Opportunities

24.6 Sonoco

24.6.1 Business Overview

24.6.2 Product Offerings

24.6.3 Key Strategies

24.6.4 Key Strengths

24.6.5 Key Opportunities

24.7 Huhtamaki

24.7.1 Business Overview

24.7.2 Product Offerings

24.7.3 Key Strategies

24.7.4 Key Strengths

24.7.5 Key Opportunities

24.8 Constantia Flexibles

24.8.1 Business Overview

24.8.2 Product Offerings

24.8.3 Key Strategies

24.8.4 Key Strengths

24.8.5 Key Opportunities

24.9 Ahlstrom-Munksjo

24.9.1 Business Overview

24.9.2 Product Offerings

24.9.3 Key Strategies

24.9.4 Key Strengths

24.9.5 Key Opportunities

24.10 GREIF

24.10.1 Business Overview

24.10.2 Product Offerings

24.10.3 Key Strategies

24.10.4 Key Strengths

24.10.5 Key Opportunities

24.11 Westrock

24.11.1 Business Overview

24.11.2 Product Offerings

24.11.3 Key Strategies

24.11.4 Key Strengths

24.11.5 Key Opportunities

24.12 Smurfit Kappa

24.12.1 Business Overview

24.12.2 Product Offerings

24.12.3 Key Strategies

24.12.4 Key Strengths

24.12.5 Key Opportunities

24.13 ALUFLEXPACK

24.13.1 Business Overview

24.13.2 Product Offerings

24.13.3 Key Strategies

24.13.4 Key Strengths

24.13.5 Key Opportunities

24.14 APTAR

24.14.1 Business Overview

24.14.2 Product Offerings

24.14.3 Key Strategies

24.14.4 Key Strengths

24.14.5 Key Opportunities

25 OTHER PROMINENT VENDORS

25.1 AL INVEST

25.1.1 Business Overview

25.1.2 Product Offerings

25.2 Aran Group

25.2.1 Business Overview

25.2.2 Product Offerings

25.3 ALUBERG

25.3.1 Business Overview

25.3.2 Product Offerings

25.4 American Packaging Corporation

25.4.1 Business Overview

25.4.2 Product Offerings

25.5 BISCHOF + KLEIN

25.5.1 Business Overview

25.5.2 Product Offerings

25.6 Bioplast

25.6.1 Business Overview

25.6.2 Product Offerings

25.7 Carcano Antonio

25.7.1 Business Overview

25.7.2 Product Offerings

25.8 Danaflex

25.8.1 Business Overview

25.8.2 Product Offerings

25.9 PRINTPACK

25.9.1 Business Overview

25.9.2 Product Offerings

25.10 ProAmpac

25.10.1 Business Overview

25.10.2 Product Offerings

25.11 Wipak

25.11.1 Business Overview

25.11.2 Product Offerings

25.12 Saica FLEX

25.12.1 Business Overview

25.12.2 Product Offerings

25.13 Etapak (Baski Ambalaj)

25.13.1 Business Overview

25.13.2 Product Offerings

- 25.14 Innovia Films
 - 25.14.1 Business Overview
 - 25.14.2 Product Offerings
- 25.15 UFLEX
 - 25.15.1 Business Overview
 - 25.15.2 Product Offerings
- 25.16 International Paper
 - 25.16.1 Business Overview
 - 25.16.2 Product Offerings
- 25.17 Reynolds Group
 - 25.17.1 Business Overview
 - 25.17.2 Product Offerings
- 25.18 Novolex
 - 25.18.1 Business Overview
 - 25.18.2 Product Offerings
- 25.19 Sigma Plastics
 - 25.19.1 Business Overview
 - 25.19.2 Product Offerings
- 25.20 Glenroy
 - 25.20.1 Business Overview
 - 25.20.2 Product Offerings
- 25.21 Symetal
 - 25.21.1 Business Overview
 - 25.21.2 Product Offerings
- 25.22 Krajcar Packaging
 - 25.22.1 Business Overview
 - 25.22.2 Product Offerings
- 25.23 ITP
 - 25.23.1 Business Overview
 - 25.23.2 Product Offerings
- 25.24 Gascogne Flexible
 - 25.24.1 Business Overview
 - 25.24.2 Product Offerings
- 25.25 Schur Flexibles
 - 25.25.1 Business Overview
 - 25.25.2 Product Offerings
- 25.26 Schmid Folien
 - 25.26.1 Business Overview
 - 25.26.2 Product Offerings

- 25.27 RKW Group
 - 25.27.1 Business Overview
 - 25.27.2 Product Offerings
- 25.28 Pouch Partners
 - 25.28.1 Business Overview
 - 25.28.2 Product Offerings
- 25.29 Perlen Packaging
 - 25.29.1 Business Overview
 - 25.29.2 Product Offerings
- 25.30 Goglio
 - 25.30.1 Business Overview
 - 25.30.2 Product Offerings
- 25.31 Kleiner Flexible Packaging
 - 25.31.1 Business Overview
 - 25.31.2 Product Offerings
- 25.32 WINPAK
 - 25.32.1 Business Overview
 - 25.32.2 Product Offerings
- 25.33 Stora ENSO
 - 25.33.1 Business Overview
 - 25.33.2 Product Offerings
- 25.34 Global-Pak
 - 25.34.1 Business Overview
 - 25.34.2 Product Offerings
- 25.35 DI Mauro
 - 25.35.1 Business Overview
 - 25.35.2 Product Offerings
- 25.36 Eurofoil
 - 25.36.1 Business Overview
 - 25.36.2 Product Offerings
- 25.37 Gerosa Group
 - 25.37.1 Business Overview
 - 25.37.2 Product Offerings
- 25.38 Leeb Flexibles
 - 25.38.1 Business Overview
 - 25.38.2 Product Offerings
- 25.39 Polypak
 - 25.39.1 Business Overview
 - 25.39.2 Product Offerings

- 25.40 Pro-Pac Packaging
 - 25.40.1 Business Overview
 - 25.40.2 Product Offerings
- 25.41 Walki Group
 - 25.41.1 Business Overview
 - 25.41.2 Product Offerings
- 25.42 WIPF
 - 25.42.1 Business Overview
 - 25.42.2 Product Offerings
- 25.43 WZ Packaging
 - 25.43.1 Business Overview
 - 25.43.2 Product Offerings

26 REPORT SUMMARY

- 26.1 Key Takeaways
- 26.2 Strategic Recommendations

27 QUANTITATIVE SUMMARY

- 27.1 Market By Geography
- 27.2 APAC
 - 27.2.1 Material
 - 27.2.2 Market Size & Forecast
 - 27.2.3 Product
 - 27.2.4 Market Size & Forecast
 - 27.2.5 Application
 - 27.2.6 Market Size & Forecast
 - 27.2.7 Consumer Flexible Packaging Market By End-User
 - 27.2.8 Market Size & Forecast
- 27.3 China
 - 27.3.1 Material
 - 27.3.2 Market Size & Forecast
 - 27.3.3 Product
 - 27.3.4 Market Size & Forecast
 - 27.3.5 Application
 - 27.3.6 Market Size & Forecast
 - 27.3.7 Consumer Flexible Packaging Market By End-User
 - 27.3.8 Market Size & Forecast

27.4 India

27.4.1 Material

27.4.2 Market Size & Forecast

27.4.3 Product

27.4.4 Market Size & Forecast

27.4.5 Application

27.4.6 Market Size & Forecast

27.4.7 Consumer Flexible Packaging Market By End-User

27.4.8 Market Size & Forecast

27.5 Australia

27.5.1 Material

27.5.2 Market Size & Forecast

27.5.3 Product

27.5.4 Market Size & Forecast

27.5.5 Application

27.5.6 Market Size & Forecast

27.5.7 Consumer Flexible Packaging Market By End-User

27.5.8 Market Size & Forecast

27.6 Japan

27.6.1 Material

27.6.2 Market Size & Forecast

27.6.3 Product

27.6.4 Market Size & Forecast

27.6.5 Application

27.6.6 Market Size & Forecast

27.6.7 Consumer Flexible Packaging Market By End-User

27.6.8 Market Size & Forecast

27.7 South Korea

27.7.1 Material

27.7.2 Market Size & Forecast

27.7.3 Product

27.7.4 Market Size & Forecast

27.7.5 Application

27.7.6 Market Size & Forecast

27.7.7 Consumer Flexible Packaging Market By End-User

27.7.8 Market Size & Forecast

27.8 New Zealand

27.8.1 Material

27.8.2 Market Size & Forecast

- 27.8.3 Product
- 27.8.4 Market Size & Forecast
- 27.8.5 Application
- 27.8.6 Market Size & Forecast
- 27.8.7 Consumer Flexible Packaging Market By End-User
- 27.8.8 Market Size & Forecast
- 27.9 Rest Of APAC
 - 27.9.1 Material
 - 27.9.2 Market Size & Forecast
 - 27.9.3 Product
 - 27.9.4 Market Size & Forecast
 - 27.9.5 Application
 - 27.9.6 Market Size & Forecast
 - 27.9.7 Consumer Flexible Packaging Market By End-User
 - 27.9.8 Market Size & Forecast
- 27.1 Europe
 - 27.10.1 Material
 - 27.10.2 Market Size & Forecast
 - 27.10.3 Product
 - 27.10.4 Market Size & Forecast
 - 27.10.5 Application
 - 27.10.6 Market Size & Forecast
 - 27.10.7 Consumer Flexible Packaging Market By End-User
 - 27.10.8 Market Size & Forecast
- 27.11 Germany
 - 27.11.1 Material
 - 27.11.2 Market Size & Forecast
 - 27.11.3 Product
 - 27.11.4 Market Size & Forecast
 - 27.11.5 Application
 - 27.11.6 Market Size & Forecast
 - 27.11.7 Consumer Flexible Packaging Market By End-User
 - 27.11.8 Market Size & Forecast
- 27.12 France
 - 27.12.1 Material
 - 27.12.2 Market Size & Forecast
 - 27.12.3 Product
 - 27.12.4 Market Size & Forecast
 - 27.12.5 Application

27.12.6 Market Size & Forecast

27.12.7 Consumer Flexible Packaging Market By End-User

27.12.8 Market Size & Forecast

27.13 UK

27.13.1 Material

27.13.2 Market Size & Forecast

27.13.3 Product

27.13.4 Market Size & Forecast

27.13.5 Application

27.13.6 Market Size & Forecast

27.13.7 Consumer Flexible Packaging Market By End-User

27.13.8 Market Size & Forecast

27.14 Italy

27.14.1 Material

27.14.2 Market Size & Forecast

27.14.3 Product

27.14.4 Market Size & Forecast

27.14.5 Application

27.14.6 Market Size & Forecast

27.14.7 Consumer Flexible Packaging Market By End-User

27.14.8 Market Size & Forecast

27.15 Benelux

27.15.1 Material

27.15.2 Market Size & Forecast

27.15.3 Product

27.15.4 Market Size & Forecast

27.15.5 Application

27.15.6 Market Size & Forecast

27.15.7 Consumer Flexible Packaging Market By End-User

27.15.8 Market Size & Forecast

27.16 Spain

27.16.1 Material

27.16.2 Market Size & Forecast

27.16.3 Product

27.16.4 Market Size & Forecast

27.16.5 Application

27.16.6 Market Size & Forecast

27.16.7 Consumer Flexible Packaging Market By End-User

27.16.8 Market Size & Forecast

27.17 Austria

27.17.1 Material

27.17.2 Market Size & Forecast

27.17.3 Product

27.17.4 Market Size & Forecast

27.17.5 Application

27.17.6 Market Size & Forecast

27.17.7 Consumer Flexible Packaging Market By End-User

27.17.8 Market Size & Forecast

27.18 Scandinavia

27.18.1 Material

27.18.2 Market Size & Forecast

27.18.3 Product

27.18.4 Market Size & Forecast

27.18.5 Application

27.18.6 Market Size & Forecast

27.18.7 Consumer Flexible Packaging Market By End-User

27.18.8 Market Size & Forecast

27.19 Switzerland

27.19.1 Material

27.19.2 Market Size & Forecast

27.19.3 Product

27.19.4 Market Size & Forecast

27.19.5 Application

27.19.6 Market Size & Forecast

27.19.7 Consumer Flexible Packaging Market By End-User

27.19.8 Market Size & Forecast

27.20 Rest Of Europe

27.20.1 Material

27.20.2 Market Size & Forecast

27.20.3 Product

27.20.4 Market Size & Forecast

27.20.5 Application

27.20.6 Market Size & Forecast

27.20.7 Consumer Flexible Packaging Market By End-User

27.20.8 Market Size & Forecast

27.21 North America

27.21.1 Material

27.21.2 Market Size & Forecast

- 27.21.3 Product
- 27.21.4 Market Size & Forecast
- 27.21.5 Application
- 27.21.6 Market Size & Forecast
- 27.21.7 Consumer Flexible Packaging Market By End-User
- 27.21.8 Market Size & Forecast
- 27.22 United States
 - 27.22.1 Material
 - 27.22.2 Market Size & Forecast
 - 27.22.3 Product
 - 27.22.4 Market Size & Forecast
 - 27.22.5 Application
 - 27.22.6 Market Size & Forecast
 - 27.22.7 Consumer Flexible Packaging Market By End-User
 - 27.22.8 Market Size & Forecast
- 27.23 Canada
 - 27.23.1 Material
 - 27.23.2 Market Size & Forecast
 - 27.23.3 Product
 - 27.23.4 Market Size & Forecast
 - 27.23.5 Application
 - 27.23.6 Market Size & Forecast
 - 27.23.7 Consumer Flexible Packaging Market By End-User
 - 27.23.8 Market Size & Forecast
- 27.24 Latin America
 - 27.24.1 Material
 - 27.24.2 Market Size & Forecast
 - 27.24.3 Product
 - 27.24.4 Market Size & Forecast
 - 27.24.5 Application
 - 27.24.6 Market Size & Forecast
 - 27.24.7 Consumer Flexible Packaging Market By End-User
 - 27.24.8 Market Size & Forecast
- 27.25 Mexico
 - 27.25.1 Material
 - 27.25.2 Market Size & Forecast
 - 27.25.3 Product
 - 27.25.4 Market Size & Forecast
 - 27.25.5 Application

27.25.6 Market Size & Forecast

27.25.7 Consumer Flexible Packaging Market By End-User

27.25.8 Market Size & Forecast

27.26 Brazil

27.26.1 Material

27.26.2 Market Size & Forecast

27.26.3 Product

27.26.4 Market Size & Forecast

27.26.5 Application

27.26.6 Market Size & Forecast

27.26.7 Consumer Flexible Packaging Market By End-User

27.26.8 Market Size & Forecast

27.27 Argentina

27.27.1 Material

27.27.2 Market Size & Forecast

27.27.3 Product

27.27.4 Market Size & Forecast

27.27.5 Application

27.27.6 Market Size & Forecast

27.27.7 Consumer Flexible Packaging Market By End-User

27.27.8 Market Size & Forecast

27.28 Chile

27.28.1 Material

27.28.2 Market Size & Forecast

27.28.3 Product

27.28.4 Market Size & Forecast

27.28.5 Application

27.28.6 Market Size & Forecast

27.28.7 Consumer Flexible Packaging Market By End-User

27.28.8 Market Size & Forecast

27.29 Rest Of Latin America

27.29.1 Material

27.29.2 Market Size & Forecast

27.29.3 Product

27.29.4 Market Size & Forecast

27.29.5 Application

27.29.6 Market Size & Forecast

27.29.7 Consumer Flexible Packaging Market By End-User

27.29.8 Market Size & Forecast

27.30 Middle East & Africa

27.30.1 Material

27.30.2 Market Size & Forecast

27.30.3 Product

27.30.4 Market Size & Forecast

27.30.5 Application

27.30.6 Market Size & Forecast

27.30.7 Consumer Flexible Packaging Market By End-User

27.30.8 Market Size & Forecast

27.31 Turkey

27.31.1 Material

27.31.2 Market Size & Forecast

27.31.3 Product

27.31.4 Market Size & Forecast

27.31.5 Application

27.31.6 Market Size & Forecast

27.31.7 Consumer Flexible Packaging Market By End-User

27.31.8 Market Size & Forecast

27.32 Egypt

27.32.1 Material

27.32.2 Market Size & Forecast

27.32.3 Product

27.32.4 Market Size & Forecast

27.32.5 Application

27.32.6 Market Size & Forecast

27.32.7 Consumer Flexible Packaging Market By End-User

27.32.8 Market Size & Forecast

27.33 Saudi Arabia

27.33.1 Material

27.33.2 Market Size & Forecast

27.33.3 Product

27.33.4 Market Size & Forecast

27.33.5 Application

27.33.6 Market Size & Forecast

27.33.7 Consumer Flexible Packaging Market By End-User

27.33.8 Market Size & Forecast

27.34 South Africa

27.34.1 Material

27.34.2 Market Size & Forecast

- 27.34.3 Product
- 27.34.4 Market Size & Forecast
- 27.34.5 Application
- 27.34.6 Market Size & Forecast
- 27.34.7 Consumer Flexible Packaging Market By End-User
- 27.34.8 Market Size & Forecast
- 27.35 UAE
 - 27.35.1 Material
 - 27.35.2 Market Size & Forecast
 - 27.35.3 Product
 - 27.35.4 Market Size & Forecast
 - 27.35.5 Application
 - 27.35.6 Market Size & Forecast
 - 27.35.7 Consumer Flexible Packaging Market By End-User
 - 27.35.8 Market Size & Forecast
- 27.36 Rest Of Middle East & Africa
 - 27.36.1 Material
 - 27.36.2 Market Size & Forecast
 - 27.36.3 Product
 - 27.36.4 Market Size & Forecast
 - 27.36.5 Application
 - 27.36.6 Market Size & Forecast
 - 27.36.7 Consumer Flexible Packaging Market By End-User
 - 27.36.8 Market Size & Forecast
- 27.37 Market By Product
 - 27.37.1 Market Size & Forecast
- 27.38 Market By Material
 - 27.38.1 Market Size & Forecast
- 27.39 Consumer Flexible Packaging By End-User
 - 27.39.1 Market Size & Forecast
- 27.4 Market By Application
 - 27.40.1 Market Size & Forecast
- 27.41 Market By Flexible Plastic
 - 27.41.1 Market Size & Forecast By Volume
- 27.42 Market By Printing
 - 27.42.1 Market Size & Forecast By Volume

28 APPENDIX

28.1 Abbreviations

List Of Exhibits

LIST OF EXHIBITS

- Exhibit 1 Segmentation of Global Flexible Packaging Market
- Exhibit 2 Market Size Calculation Approach 2020
- Exhibit 3 Packaging Value Chain
- Exhibit 4 Types of Flexible Plastic Materials
- Exhibit 5 Geographical Growth Momentum and Market Share
- Exhibit 6 Advantages of Flexible Packaging
- Exhibit 7 Impact of COVID-19 on Packaging Substrates
- Exhibit 8 Growth Drivers of Flexible Packaging Market 2020
- Exhibit 9 Impact of Increased Focus on Sustainable Flexible Packaging
- Exhibit 10 Plastic Waste Generation during COVID-19
- Exhibit 11 Resource Comparison
- Exhibit 12 Impact of Profit Volatility in APAC Region
- Exhibit 13 Impact of Increasing Use of High-barrier Plastic Packaging Materials
- Exhibit 14 Key Advantages of High Barrier Packaging
- Exhibit 15 Impact of Increasing Adoption of Flexible Packaging
- Exhibit 16 Impact of Growth in E-commerce Industry
- Exhibit 17 Impact of Increasing Demand from Healthcare Industry
- Exhibit 18 Growth Parameters
- Exhibit 19 Global Healthcare Packaging Market by Packaging Material 2018
- Exhibit 20 Mega Trends in Pharmaceutical Industry
- Exhibit 21 Impact of Demand for Lightweight Products
- Exhibit 22 Factors Influencing Demand for Lightweight Packaging
- Exhibit 23 Impact of Increasing Demand for Pouch Packaging
- Exhibit 24 Global Pouch Packaging Market by Application 2018 (by volume)
- Exhibit 25 Impact of Increasing Consumption of Processed and Packaged Food
- Exhibit 26 GDP and Consumption in 2020
- Exhibit 27 Key Highlights
- Exhibit 28 Impact of Increase in Shelf Life
- Exhibit 29 Impact of Recycling Challenges with Flexible Packaging Products
- Exhibit 30 Plastic Packaging Market in Various Industries 2018
- Exhibit 31 Recycling Rates in Packaging Market 2020
- Exhibit 32 Recycling Yield Rates in 2012 & 2020
- Exhibit 33 Impact of Higher Operational Cost
- Exhibit 34 Material Contribution in Flexible Packaging
- Exhibit 35 American Polyethylene Butene Raw Material Prices 2017–2020 (Price per

Pound)

Exhibit 36 American Polypropylene Raw Material Prices 2017–2020 (Price per Pound)

Exhibit 37 Impact of Fragmented Marketplace

Exhibit 38 Key Competitive Factors

Exhibit 39 Impact of Rising Raw Material Costs

Exhibit 40 Average Price Rise in November 2020 (cents per pound)

Exhibit 41 Impact of Slow Economic Growth in 2020

Exhibit 42 GDP of Major Countries in 2020

Exhibit 43 CAGR Across Geography (%)

Exhibit 44 Revenue Share by Key Regions in 2020 & 2025 (%)

Exhibit 45 Market Dynamics of Flexible Plastic Packaging

Exhibit 46 Market Dynamics of Flexible Paper Packaging

Exhibit 47 Market Dynamics of Foil Packaging

Exhibit 48 Global Flexible Packaging Market 2020–2026 (\$ billion)

Exhibit 49 Five Forces Analysis 2020

Exhibit 50 Incremental Growth of Flexible Packaging Market by Material 2020 & 2026

Exhibit 51 Market Share by Material Type 2020 & 2026

Exhibit 52 Market Dynamics of Flexible Plastic Packaging

Exhibit 53 Value Chain of Packaging Paper

Exhibit 54 Stand-up Pouches Market by Application 2020 (Volume Share)

Exhibit 55 Global Flexible Plastic Packaging Market 2020–2026 (\$ billion)

Exhibit 56 Pouch Value Chain

Exhibit 57 Packaging Polymers

Exhibit 58 Global Flexible Plastic Packaging Market by PE 2020–2026 (million tons)

Exhibit 59 Global Flexible Plastic Packaging Market by BOPP 2020–2026 (million tons)

Exhibit 60 Global Flexible Plastic Packaging Market by CPP 2020–2026 (million tons)

Exhibit 61 Global PP Production Forecast (\$ billion)

Exhibit 62 Global Flexible Plastic Packaging Market by BOPET 2020–2026 (million tons)

Exhibit 63 Global Flexible Plastic Packaging Market by PA 2020–2026 (million tons)

Exhibit 64 Global Flexible Plastic Packaging Market by PET 2020–2026 (million tons)

Exhibit 65 Key Highlights of PVC Market 2019

Exhibit 66 Global Flexible Plastic Packaging Market by PVC 2020–2026 (million tons)

Exhibit 67 Global Flexible Plastic Packaging Market by EVOH 2020–2026 (million tons)

Exhibit 68 Global Flexible Plastic Packaging Market by Other Polymers 2020–2026 (million tons)

Exhibit 69 Global Flexible Paper Packaging Market 2020–2026 (\$ billion)

Exhibit 70 Global Flexible Foil Packaging Market 2020–2026 (\$ billion)

Exhibit 71 Incremental Growth by Application Segment 2020 & 2026

- Exhibit 72 Flexible Packaging Market by Application 2020 & 2026
- Exhibit 73 Consumer Flexible Packaging Market by Geography in 2020 (%)
- Exhibit 74 Global Consumer Flexible Packaging Market 2020?2026 (\$ billion)
- Exhibit 75 Global E-commerce Retail Sales (\$ billion)
- Exhibit 76 Market Snapshot
- Exhibit 77 Global Industrial Flexible Packaging Market 2020?2026 (\$ billion)
- Exhibit 78 Incremental Growth of Consumer Flexible Packaging Market by End-user 2020 & 2026
- Exhibit 79 Europe Food & Beverages Industry Snapshot 2020
- Exhibit 80 Key Insights
- Exhibit 81 Customer Landscape of Global Flexible Food Packaging Market
- Exhibit 82 Growth of Flexible Packaging in Pet Food Segment
- Exhibit 83 Global Bakery & Confectionery Flexible Packaging Market 2020?2026 (\$ billion)
- Exhibit 84 Confectionery Sales Statistics in 2020
- Exhibit 85 Global Meat, Poultry, & Seafood Flexible Packaging Market 2020?2026 (\$ billion)
- Exhibit 86 Milk Production by Major Exporters 2020 (million metric tons)
- Exhibit 87 Global Dairy Flexible Packaging Market 2020?2026 (\$ billion)
- Exhibit 88 Global RTE Flexible Packaging Market 2020?2026 (\$ billion)
- Exhibit 89 Global Healthcare Industry Revenue 2020 (\$ billion)
- Exhibit 90 Global Healthcare Flexible Packaging Market 2020–2026 (\$ billion)
- Exhibit 91 Global Flexible Frozen Foods Packaging Market 2020–2026 (\$ billion)
- Exhibit 92 Key Highlights 2020
- Exhibit 93 Global Tea & Coffee Flexible Packaging Market 2020?2026 (\$ billion)
- Exhibit 94 Market Insights in Personal Care Segment 2020
- Exhibit 95 Global Personal Care Flexible Packaging Market 2020?2026 (\$ billion)
- Exhibit 96 Global Pet Food Sales 2016–2021 (\$ billion)
- Exhibit 97 Global Petfood Flexible Packaging Market 2020–2026 (\$ billion)
- Exhibit 98 Other Segments of Flexible Packaging Market
- Exhibit 99 Global Other Flexible Packaging Market 2020–2026 (\$ billion)
- Exhibit 100 Incremental Growth of Flexible Packaging Market by Product Type 2020 & 2026
- Exhibit 101 Flexible Packaging Market by Product Type 2020 & 2026
- Exhibit 102 Global Flexible Packaging Market by Bags and Sacks 2020–2026 (\$ billion)
- Exhibit 103 Retailer & Manufacturer Trends in Flexible Pouch Market 2020
- Exhibit 104 Market Dynamics of Flexible Pouches
- Exhibit 105 Global Flexible Packaging Market by Pouches 2020–2026 (\$ billion)
- Exhibit 106 Other Products: Global Flexible Packaging Market 2020–2026 (\$ billion)

- Exhibit 107 Incremental Growth by Printing Segment 2020 & 2026 (billion units)
- Exhibit 108 Regional Insights
- Exhibit 109 Market Dynamics of Flexographic Printing Market 2020
- Exhibit 110 Global Flexible Packaging Market by Flexographic Printing 2020–2026 (billion units)
- Exhibit 111 Rotogravure Plants in Europe 2020
- Exhibit 112 Global Flexible Packaging Market by Rotogravure & Other Printing Types 2020–2026 (billion units)
- Exhibit 113 Incremental Growth by Geography 2020 & 2026
- Exhibit 114 Geographic Snapshot 2021–2026
- Exhibit 115 Flexible Packaging Market in APAC 2020–2026
- Exhibit 116 Risk Assessment - APAC
- Exhibit 117 Flexible Packaging Market in APAC 2020–2026 (\$ billion)
- Exhibit 118 Incremental Growth in APAC 2020 & 2026
- Exhibit 119 Flexible Packaging Market in China 2020–2026 (\$ billion)
- Exhibit 120 Key Highlights of Flexible Packaging in China 2020 & 2020
- Exhibit 121 Flexible Packaging Market in China 2020–2026
- Exhibit 122 Key Highlights
- Exhibit 123 Flexible Packaging Market in India 2020–2026 (\$ billion)
- Exhibit 124 Key Factors Impacting Demand for Flexible Packaging in India
- Exhibit 125 Key Factors Influencing Demand for Flexible Packaging in Australia
- Exhibit 126 Flexible Packaging Market in Australia 2020–2026 (\$ billion)
- Exhibit 127 Packaging Market in Australia 2020
- Exhibit 128 Future Trends in Flexible Packaging Market in Australia
- Exhibit 129 Japanese Flexible Packaging Industry
- Exhibit 130 Packaging Industry Revenue in Japan (\$ billion)
- Exhibit 131 Flexible Packaging Market in Japan 2020–2026 (\$ billion)
- Exhibit 132 Key Highlights
- Exhibit 133 Flexible Packaging Market in South Korea 2020–2026 (\$ billion)
- Exhibit 134 Packaged Food Retail Sales in South Korea 2019 & 2023 (\$ billion)
- Exhibit 135 Key Highlights of Flexible Packaging Market in New Zealand
- Exhibit 136 F&B Industry in New Zealand in 2020
- Exhibit 137 Flexible Packaging Market in New Zealand 2020–2026 (\$ billion)
- Exhibit 138 Flexible Packaging Market in Rest of APAC 2020–2026 (\$ billion)
- Exhibit 139 Europe Flexible Packaging Market 2020–2026
- Exhibit 140 Risk Assessment of Europe Flexible Packaging Market
- Exhibit 141 Growth Drivers of Europe Flexible Packaging Market
- Exhibit 142 Europe Flexible Packaging Market 2020–2026 (\$ billion)
- Exhibit 144 Incremental Growth in Europe 2020 & 2026

- Exhibit 145 Largest Sectors under F&B Industry 2018
- Exhibit 146 Flexible Packaging Market in Germany 2020–2026 (\$ billion)
- Exhibit 147 Key Highlights of Plastic Industry in Germany
- Exhibit 148 Factors Influencing Demand for Flexible Packaging in France
- Exhibit 149 Flexible Packaging Market in France 2020–2026 (\$ billion)
- Exhibit 150 UK Plastic Export Distribution in January-June 2020 (%)
- Exhibit 151 Flexible Packaging Market in UK 2020–2026 (\$ billion)
- Exhibit 152 Factors Influencing Demand for Flexible Packaging in Italy
- Exhibit 153 Flexible Packaging Market in Italy 2020–2026 (\$ billion)
- Exhibit 154 Flexible Packaging Market in Benelux 2020–2026 (\$ billion)
- Exhibit 155 Spain's Economy in 2020
- Exhibit 156 Per Capita Consumption of Fresh Meat in Spain 2019 (in kilogram)
- Exhibit 157 Flexible Packaging Market in Spain 2020–2026 (\$ billion)
- Exhibit 158 Flexible Packaging Market in Austria 2020–2026 (\$ billion)
- Exhibit 159 Flexible Packaging Market in Scandinavia 2020–2026 (\$ billion)
- Exhibit 160 Flexible Packaging Market in Switzerland 2020–2025 (\$ billion)
- Exhibit 161 Flexible Packaging Market in Rest of Europe 2020–2026 (\$ billion)
- Exhibit 162 North America Flexible Packaging Market 2020-2026
- Exhibit 163 Risk Assessment of Flexible Packaging Market in North America
- Exhibit 164 Major Regulations
- Exhibit 165 North America Flexible Packaging Market 2020–2026 (\$ billion)
- Exhibit 166 Incremental Growth in North America 2020 & 2026
- Exhibit 167 Key Demand Factors in US
- Exhibit 168 Flexible Packaging Market in US 2020–2026 (\$ billion)
- Exhibit 169 Food Service Industry in Canada
- Exhibit 170 Flexible Packaging Market in Canada 2020–2026 (\$ billion)
- Exhibit 171 Export of Processed Food in Canada 2020
- Exhibit 172 Flexible Packaging Market in Latin America 2020-2026
- Exhibit 173 Risk Assessment of Flexible Packaging Market in Latin America
- Exhibit 174 Flexible Packaging Market in Latin America 2020–2026 (\$ billion)
- Exhibit 175 Incremental Growth in Latin America 2020 & 2026
- Exhibit 176 Flexible Packaging Market in Mexico 2020–2026 (\$ billion)
- Exhibit 177 Per Capita Meat Consumption in Mexico 2019 & 2020 (in kilograms)
- Exhibit 178 Beef Production in Brazil (in million tons)
- Exhibit 179 Flexible Packaging Market in Brazil 2020–2026 (\$ billion)
- Exhibit 180 Flexible Packaging Market in Argentina 2020–2026 (\$ billion)
- Exhibit 181 Flexible Packaging Market in Chile 2020–2026 (\$ billion)
- Exhibit 182 Flexible Packaging Market in Rest of Latin America 2020–2026 (\$ billion)
- Exhibit 183 Flexible Packaging Market in Middle East & Africa 2020–2026

- Exhibit 184 Risk Assessment of Flexible Packaging Market in Middle East & Africa
- Exhibit 185 COVID-19 Impact on Industries
- Exhibit 186 Middle East & Africa Flexible Packaging Market 2020–2026 (\$ billion)
- Exhibit 187 Incremental Growth in Middle East & Africa 2020 & 2026
- Exhibit 188 Dairy Exports in Turkey 2017–2019 (thousand tons)
- Exhibit 189 Flexible Packaging Market in Turkey 2020–2026 (\$ billion)
- Exhibit 190 Flexible Packaging Market in Egypt 2020–2026 (\$ billion)
- Exhibit 191 Flexible Packaging market in Saudi Arabia 2020–2026 (\$ billion)
- Exhibit 192 Flexible Packaging Market in South Africa 2020–2026 (\$ billion)
- Exhibit 193 Per Capita Consumption of Meat in South Africa 2019
- Exhibit 194 Flexible Packaging Market in UAE 2020–2026 (\$ billion)
- Exhibit 195 Flexible Packaging Market in Rest of Middle East & Africa 2020–2026 (\$ billion)
- Exhibit 196 Mergers & Acquisitions in 2019 & 2020
- Exhibit 197 Carcano Antonio: Major Product Offerings
- Exhibit 198 Saica Flex: Major Product Offerings
- Exhibit 199 Etapak (Bask? Ambalaj): Major Product Offerings
- Exhibit 200 Krajcar Packaging: Major Product Offerings
- Exhibit 201 Global Consumer Flexible Packaging Market by End-user 2020?2026 (\$ billion)
- Exhibit 202 Global Consumer Flexible Packaging Market by End-user 2020?2026 (Revenue %)

List Of Tables

LIST OF TABLES

Table 1 Key Caveats

Table 2 Currency Conversion 2013?2020

Table 3 Flexible vs Rigid Packaging

Table 4 Differences between Flexible and Rigid Packaging

Table 5 Packaging Product Comparison

Table 6 Packaging Product Manufacturing Comparison

Table 7 Packaging Product Logistics Cost Comparison

Table 8 Cost Break-up of Flexible Packaging 2016, 2017, & 2020 (%)

Table 9 Global Flexible Packaging Market by Product Type 2020–2026 (\$ billion)

Table 10 Global Flexible Packaging Market by Application 2020–2026 (\$ billion)

Table 11 Global Flexible Packaging Market by Material Type 2020–2026 (\$ billion)

Table 12 Global Consumer Flexible Packaging Market by End-user 2020–2026 (\$ billion)

Table 13 Global Flexible Plastic Packaging Market by Material 2020–2026 (million tons)

Table 14 Global Flexible Packaging Market by Printing Type 2020–2026 (billion units)

Table 15 Flexible Plastic Packaging Market by Geography 2020?2026 (\$ billion)

Table 16 Flexible Paper Packaging Market by Geography 2020?2026 (\$ billion)

Table 17 Global Flexible Foil Packaging Market by Geography 2020?2026 (\$ billion)

Table 18 Consumer Flexible Packaging Market by Geography 2020?2026 (\$ billion)

Table 19 Industrial Flexible Packaging Market by Geography 2020?2026 (\$ billion)

Table 20 Flexible Packaging Market by Bakery and Confectionary Segment 2020?2026 (\$ billion)

Table 21 Global Meat, Poultry, & Seafood Packaging Market by Geography 2020?2026 (\$ billion)

Table 22 Dairy Flexible Packaging Market by Geography 2020?2026 (\$ billion)

Table 23 Global Flexible RTE Packaging Market by Geography 2020?2026 (\$ billion)

Table 24 Global Flexible Healthcare Packaging Market by Geography 2020–2026 (\$ billion)

Table 25 Global Flexible Frozen Food Packaging Market by Geography 2020–2026 (\$ billion)

Table 26 Global Flexible Tea & Coffee Packaging Market by Geography 2020?2026 (\$ billion)

Table 27 Retail Sector APAC 2020

Table 28 Personal Care Market 2020 (\$ billion)

Table 29 Global Personal Care Flexible Packaging Market by Geography 2020?2026 (\$

billion)

Table 30 Global Flexible Pet Food Packaging Market by Geography 2020–2026 (\$ billion)

Table 31 Global Other Flexible Packaging Market by Geography 2020–2026 (\$ billion)

Table 32 Flexible Bags & Sacks Packaging Market by Geography 2020–2026 (\$ billion)

Table 33 Flexible Pouches Packaging Market by Geography 2020–2026 (\$ billion)

Table 34 Other Product Types: Flexible Packaging Market by Geography 2020–2026 (\$ billion)

Table 35 Comparison of Printing Types

Table 36 Packaging Spend and GDP

Table 37 APAC Flexible Packaging Market by Material 2020–2026 (\$ billion)

Table 38 APAC Flexible Packaging Market by Product 2020–2026 (\$ billion)

Table 39 APAC Flexible Packaging Market by Application 2020–2026 (\$ billion)

Table 40 APAC Consumer Flexible Packaging Market by End-user 2020–2026 (\$ billion)

Table 41 Flexible Packaging Market in China by Material Type 2020–2026 (\$ billion)

Table 42 Flexible Packaging Market in China by Product Type 2020–2026 (\$ billion)

Table 43 Flexible Packaging Market in China by Application 2020–2026 (\$ billion)

Table 44 Consumer Flexible Packaging Market in China by End-user 2020–2026 (\$ million)

Table 45 Flexible Packaging Market in India by Material 2020–2026 (\$ billion)

Table 46 Flexible Packaging Market in India by Product 2020–2026 (\$ billion)

Table 47 Flexible Packaging Market in India by Application 2020–2026 (\$ billion)

Table 48 Consumer Flexible Packaging Market in India by End-user 2020–2026 (\$ million)

Table 49 Flexible Packaging Market in Australia by Material 2020–2026 (\$ million)

Table 50 Flexible Packaging Market in Australia by Product 2020–2026 (\$ billion)

Table 51 Flexible Packaging Market in Australia by Application 2020–2026 (\$ billion)

Table 52 Consumer Flexible Packaging Market in Australia by End-user 2020–2026 (\$ million)

Table 53 Flexible Packaging Market in Japan by Material 2020–2026 (\$ million)

Table 54 Flexible Packaging Market in Japan by Product 2020–2026 (\$ million)

Table 55 Flexible Packaging Market in Japan by Application 2020–2026 (\$ million)

Table 56 Consumer Flexible Packaging Market in Japan by End-user 2020–2026 (\$ million)

Table 57 Flexible Packaging Market in South Korea by Material 2020–2026 (\$ million)

Table 58 Flexible Packaging Market in South Korea by Product 2020–2026 (\$ million)

Table 59 Flexible Packaging Market in South Korea by Application 2020–2026 (\$ million)

Table 60 Consumer Flexible Packaging Market in South Korea by End-user 2020–2026 (\$ million)

Table 61 Flexible Packaging Market in New Zealand by Material 2020–2026 (\$ million)

Table 62 Flexible Packaging Market in New Zealand by Product 2020–2026 (\$ million)

Table 63 Flexible Packaging Market in New Zealand by Application 2020–2026 (\$ million)

Table 64 Consumer Flexible Packaging Market in New Zealand by End-user 2020–2026 (\$ million)

Table 65 Flexible Packaging Market in Rest of APAC by Material 2020–2026 (\$ billion)

Table 66 Flexible Packaging Market in Rest of APAC by Product 2020–2026 (\$ billion)

Table 67 Flexible Packaging Market in Rest of APAC by Application 2020–2026 (\$ billion)

Table 68 Consumer Flexible Packaging Market in Rest of APAC by End-user 2020–2026 (\$ million)

Table 69 Europe Flexible Packaging Market by Material 2020–2026 (\$ billion)

Table 70 Europe Flexible Packaging Market by Product 2020–2026 (\$ billion)

Table 71 Europe Flexible Packaging Market by Application 2020–2026 (\$ billion)

Table 72 Europe Consumer Flexible Packaging Market by End-user 2020–2026 (\$ billion)

Table 73 Flexible Packaging Market in Germany by Material Type 2020–2026 (\$ billion)

Table 74 Flexible Packaging Market in Germany by Product Type 2020–2026 (\$ billion)

Table 75 Flexible Packaging Market in Germany by Application 2020–2026 (\$ billion)

Table 76 Consumer Flexible Packaging Market in Germany by End-user 2020–2026 (\$ billion)

Table 77 Food Processing Industry in France 2018

Table 78 Flexible Packaging Market in France by Material 2020–2026 (\$ billion)

Table 79 Flexible Packaging Market in France by Product 2020–2026 (\$ billion)

Table 80 Flexible Packaging Market in France by Application 2020–2026 (\$ billion)

Table 81 Consumer Flexible Packaging Market in France by End-user 2020–2026 (\$ billion)

Table 82 Flexible Packaging Market in UK by Material Type 2020–2026 (\$ billion)

Table 83 Flexible Packaging Market in UK by Product 2020–2026 (\$ billion)

Table 84 Flexible Packaging Market in UK by Application 2020–2026 (\$ billion)

Table 85 Consumer Flexible Packaging Market in UK by End-user 2020–2026 (\$ million)

Table 86 Flexible Packaging Market in Italy by Material 2020–2026 (\$ billion)

Table 87 Flexible Packaging Market in Italy by Product 2020–2026 (\$ billion)

Table 88 Flexible Packaging Market in Italy by Application 2020–2026 (\$ billion)

Table 89 Consumer Flexible Packaging Market in Italy by End-user 2020–2026 (\$

million)

Table 90 Flexible Packaging Market in Benelux by Material 2020–2026 (\$ million)

Table 91 Flexible Packaging Market in Benelux by Product 2020–2026 (\$ million)

Table 92 Flexible Packaging Market in Benelux by Application 2020–2026 (\$ million)

Table 93 Consumer Flexible Packaging Market in Benelux by End-user 2020–2026 (\$ million)

Table 94 Flexible Packaging Market in Spain by Material 2020–2026 (\$ million)

Table 95 Flexible Packaging Market in Spain by Product 2020–2026 (\$ million)

Table 96 Flexible Packaging Market in Spain by Application 2020–2026 (\$ million)

Table 97 Consumer Flexible Packaging Market in Spain by End-user 2020–2026 (\$ million)

Table 98 Flexible Packaging Market in Austria by Material 2020–2026 (\$ million)

Table 99 Flexible Packaging Market in Austria by Product 2020–2026 (\$ million)

Table 100 Flexible Packaging Market in Austria by Application 2020–2026 (\$ million)

Table 101 Consumer Flexible Packaging Market in Austria by End-user 2020–2026 (\$ million)

Table 102 Flexible Packaging Market in Scandinavia by Material 2020–2026 (\$ million)

Table 103 Flexible Packaging Market in Scandinavia by Product 2020–2026 (\$ million)

Table 104 Flexible Packaging Market in Scandinavia by Application 2020–2026 (\$ million)

Table 105 Consumer Flexible Packaging Market in Scandinavia by End-user 2020–2026 (\$ million)

Table 106 Flexible Packaging Market in Switzerland by Material 2020–2026 (\$ million)

Table 107 Flexible Packaging Market in Switzerland by Product 2020–2026 (\$ million)

Table 108 Flexible Packaging Market in Switzerland by Application 2020–2026 (\$ million)

Table 109 Consumer Flexible Packaging Market in Switzerland by End-user 2020–2026 (\$ million)

Table 110 Flexible Packaging Market in Rest of Europe by Material 2020–2026 (\$ million)

Table 111 Flexible Packaging Market in Rest of Europe by Product 2020–2026 (\$ million)

Table 112 Flexible Packaging Market in Rest of Europe by Application 2020–2026 (\$ million)

Table 113 Consumer Flexible Packaging Market in Rest of Europe by End-user 2020–2026 (\$ million)

Table 114 North America Flexible Packaging Market by Material 2020–2026 (\$ billion)

Table 115 North America Flexible Packaging Market by Product 2020–2026 (\$ billion)

Table 116 North America Flexible Packaging Market by Application 2020–2026 (\$

billion)

Table 117 North America Consumer Flexible Packaging Market by End-user 2020–2026 (\$ billion)

Table 118 Flexible Packaging Market in US by Material 2020–2026 (\$ billion)

Table 119 Flexible Packaging Market in US by Product 2020–2026 (\$ billion)

Table 120 Flexible Packaging Market in US by Application 2020–2026 (\$ billion)

Table 121 Consumer Flexible Packaging Market in US by End-user 2020–2026 (\$ billion)

Table 122 Flexible Packaging Market in Canada by Material 2020–2026 (\$ billion)

Table 123 Flexible Packaging Market in Canada by Product 2020–2026 (\$ billion)

Table 124 Flexible Packaging Market in Canada by Application 2020–2026 (\$ billion)

Table 125 Consumer Flexible Packaging Market in Canada by End-user 2020–2026 (\$ billion)

Table 126 Latin America by Key Macroeconomic Factors 2019

Table 127 Latin America Flexible Packaging Market by Material 2020–2026 (\$ billion)

Table 128 Latin America Flexible Packaging Market by Product 2020–2026 (\$ billion)

Table 129 Latin America Flexible Packaging Market by Application 2020–2026 (\$ billion)

Table 130 Latin America Consumer Flexible Packaging Market by End-user 2020–2026 (\$ million)

Table 131 Flexible Packaging Market in Mexico by Material 2020–2026 (\$ billion)

Table 132 Flexible Packaging Market in Mexico by Product 2020–2026 (\$ million)

Table 133 Flexible Packaging Market in Mexico by Application 2020–2026 (\$ million)

Table 134 Consumer Flexible Packaging Market in Mexico by End-user 2020–2026 (\$ million)

Table 135 Flexible Packaging Market in Brazil by Material 2020–2026 (\$ million)

Table 136 Flexible Packaging Market in Brazil by Product 2020–2026 (\$ billion)

Table 137 Flexible Packaging Market in Brazil by Application 2020–2026 (\$ billion)

Table 138 Consumer Flexible Packaging Market in Brazil by End-user 2020–2026 (\$ million)

Table 139 Flexible Packaging Market in Argentina by Material 2020–2026 (\$ million)

Table 140 Flexible Packaging Market in Argentina by Product 2020–2026 (\$ million)

Table 141 Flexible Packaging Market in Argentina by Application 2020–2026 (\$ million)

Table 142 Consumer Flexible Packaging Market in Argentina by End-user 2020–2026 (\$ million)

Table 143 Flexible Packaging Market in Chile by Material 2020–2026 (\$ million)

Table 144 Flexible Packaging Market in Chile by Product 2020–2026 (\$ million)

Table 145 Flexible Packaging Market in Chile by Application 2020–2026 (\$ million)

Table 146 Consumer Flexible Packaging Market in Chile by End-user 2020–2026 (\$ million)

Table 147 Flexible Packaging Market in Rest of Latin America by Material 2020–2026 (\$ million)

Table 148 Flexible Packaging Market in Rest of Latin America by Product 2020–2026 (\$ million)

Table 149 Flexible Packaging Market in Rest of Latin America by Application 2020–2026 (\$ million)

Table 150 Consumer Flexible Packaging Market in Rest of Latin America by End-user 2020–2026 (\$ million)

Table 151 Middle East & Africa Flexible Packaging Market by Material 2020–2026 (\$ million)

Table 152 Middle East & Africa Flexible Packaging Market by Product 2020–2026 (\$ million)

Table 153 Middle East & Africa Flexible Packaging Market by Application 2020–2026 (\$ million)

Table 154 Middle East & Africa Consumer Flexible Packaging Market by End-user 2020–2026 (\$ million)

Table 155 Flexible Packaging Market in Turkey by Material 2020–2026 (\$ million)

Table 156 Flexible Packaging Market in Turkey by Product 2020–2026 (\$ million)

Table 157 Flexible Packaging Market in Turkey by Application 2020–2026 (\$ million)

Table 158 Consumer Flexible Packaging Market in Turkey by End-user 2020–2026 (\$ million)

Table 159 Flexible Packaging Market in Egypt by Material 2020–2026 (\$ million)

Table 160 Flexible Packaging Market in Egypt by Product 2020–2026 (\$ million)

Table 161 Flexible Packaging Market in Egypt by Application 2020–2026 (\$ million)

Table 162 Consumer Flexible Packaging Market in Egypt by End-user 2020–2026 (\$ million)

Table 163 Flexible Packaging Market in Saudi Arabia by Material 2020–2026 (\$ million)

Table 164 Flexible Packaging Market in Saudi Arabia by Product 2020–2026 (\$ million)

Table 165 Flexible Packaging Market in Saudi Arabia by Application 2020–2026 (\$ million)

Table 166 Consumer Flexible Packaging Market in Saudi Arabia by End-user 2020–2026 (\$ million)

Table 167 Flexible Packaging Market in South Africa by Material 2020–2026 (\$ million)

Table 168 Flexible Packaging Market in South Africa by Product 2020–2026 (\$ million)

Table 169 Flexible Packaging Market in South Africa by Application 2020–2026 (\$ million)

Table 170 Consumer Flexible Packaging Market in South Africa by End-user 2020–2026 (\$ million)

Table 171 Flexible Packaging Market in UAE by Material 2020–2026 (\$ million)

Table 172 Flexible Packaging Market in UAE by Product 2020–2026 (\$ million)

Table 173 Flexible Packaging Market in UAE by Application 2020–2026 (\$ million)

Table 174 Consumer Flexible Packaging Market in UAE by End-user 2020–2026 (\$ million)

Table 175 Flexible Packaging Market in Rest of MEA by Material 2020–2026 (\$ million)

Table 176 Flexible Packaging Market in Rest of MEA by Product 2020–2026 (\$ million)

Table 177 Flexible Packaging Market in Rest of MEA by Application 2020–2026 (\$ million)

Table 178 Consumer Flexible Packaging Market in Rest of MEA by End-user 2020–2026 (\$ million)

Table 179 Amcor: Major Product Offerings

Table 180 Berry Global: Major Product Offerings

Table 181 Mondi: Major Product Offerings

Table 182 Sealed Air: Major Product Offerings

Table 183 TC Transcontinental: Major Product Offerings

Table 184 Sonoco: Major Product Offerings

Table 185 Huhtamaki: Major Product Offerings

Table 186 Constantia Flexibles: Major Product Offerings

Table 187 Ahlstrom-Munksjo: Major Product Offerings

Table 188 Greif: Major Product Offerings

Table 189 Westrock: Major Product Offerings

Table 190 Smurfit Kappa: Major Product Offerings

Table 191 Aluflexpack: Major Product Offerings

Table 192 Aptar: Major Product Offerings

Table 193 AL INVEST: Major Product Offerings

Table 194 Aran group: Major Product Offerings

Table 195 Aluberg: Major Product Offerings

Table 196 American Packaging Corporation: Key Product Offerings

Table 197 Bischof + Klein: Major Product Offerings

Table 198 Bioplast: Product Offerings

Table 199 Danaflex: Major Product Offerings

Table 200 Printpack: Major Product Offerings

Table 201 ProAmpac: Major Product Offerings

Table 202 Wipak Group: Major Product Offerings

Table 203 Innovia Films: Major Product Offerings

Table 204 Uflex: Major Product Offerings

Table 205 International Paper: Key Product Offerings

Table 206 Reynolds Group: Major Product Offerings

Table 207 Novolex: Major Product Offerings

Table 208 Sigma Plastics: Major Product Offerings
Table 209 Glenroy: Major Product Offerings
Table 210 Symetal: Major Product Offerings
Table 211 ITP: Major Product Offerings
Table 212 Gascogne Flexible: Major Product Offerings
Table 213 Schur Flexibles: Major Product Offerings
Table 214 Schmid Folien: Major Product Offerings
Table 215 RKW Group: Major Product Offerings
Table 216 Pouch Partners: Major Product Offerings
Table 217 Perlen Packaging: Major Product Offerings
Table 218 Goglio: Major Product Offerings
Table 219 Kleiner Flexible Packaging: Major Product Offerings
Table 220 Winpak: Key Product Offerings
Table 221 Stora Enso: Key Product Offerings
Table 222 Global-Pak: Key Product Offerings
Table 223 WestRock: Product Offerings
Table 224 Di Mauro: Product Offerings
Table 225 Eurofoil: Major Product Offerings
Table 226 Gerosa Group: Product Offerings
Table 227 LEEB Flexibles: Product Offerings
Table 228 PolyPak: Product Offerings
Table 229 Pro-Pac Packaging: Product Offerings
Table 230 Walki Group: Major Product Offerings
Table 231 Wipf: Major Product Offerings
Table 232 WZ Packaging: Major Product Offerings
Table 233 Global Flexible Packaging Market by Geography 2020–2026 (\$ billion)
Table 234 Global Flexible Packaging Market by Geography 2020–2026 (Revenue %)
Table 235 APAC Flexible Packaging Market by Material 2020?2026 (\$ billion)
Table 236 APAC Flexible Packaging Market by Product 2020?2026 (\$ billion)
Table 237 APAC Flexible Packaging Market by Application 2020?2026 (\$ billion)
Table 238 APAC Consumer Flexible Packaging Market by End-user 2020?2026 (\$ billion)
Table 239 Flexible Packaging Market by Material in China 2020?2026 (\$ billion)
Table 240 Flexible Packaging Market in China by Product 2020?2026 (\$ billion)
Table 241 Flexible Packaging Market in China by Application 2020?2026 (\$ billion)
Table 242 Consumer Flexible Packaging Market in China by End-user 2020?2026 (\$ million)
Table 243 Flexible Packaging Market in India by Material 2020?2026 (\$ billion)
Table 244 Flexible Packaging Market in India by Product 2020?2026 (\$ billion)

Table 245 Flexible Packaging Market in India by Application 2020?2026 (\$ billion)

Table 246 Consumer Flexible Packaging Market in India by End-user 2020?2026 (\$ million)

Table 247 Flexible Packaging Market in Australia by Material 2020?2026 (\$ million)

Table 248 Flexible Packaging Market in Australia by Product 2020?2026 (\$ billion)

Table 249 Flexible Packaging Market in Australia by Application 2020?2026 (\$ billion)

Table 250 Consumer Flexible Packaging Market in Australia by End-user 2020?2026 (\$ million)

Table 251 Flexible Packaging Market in Japan by Material 2020?2026 (\$ million)

Table 252 Flexible Packaging Market in Japan by Product 2020?2026 (\$ million)

Table 253 Flexible Packaging Market in Japan by Application 2020?2026 (\$ million)

Table 254 Consumer Flexible Packaging Market in Japan by End-user 2020?2026 (\$ million)

Table 255 Flexible Packaging Market in South Korea by Material 2020?2026 (\$ million)

Table 256 Flexible Packaging Market in South Korea by Product 2020?2026 (\$ million)

Table 257 Flexible Packaging Market in South Korea by Application 2020?2026 (\$ million)

Table 258 Consumer Flexible Packaging Market in South Korea by End-user 2020?2026 (\$ million)

Table 259 Flexible Packaging Market in New Zealand by Material 2020?2026 (\$ million)

Table 260 Flexible Packaging Market in New Zealand by Product 2020?2026 (\$ million)

Table 261 Flexible Packaging Market in New Zealand by Application 2020–2026 (\$ million)

Table 262 Consumer Flexible Packaging Market in New Zealand by End-user 2020–2026 (\$ million)

Table 263 Flexible Packaging Market in Rest of APAC by Material 2020?2026 (\$ billion)

Table 264 Flexible Packaging Market in Rest of APAC by Product 2020–2026 (\$ billion)

Table 265 Flexible Packaging Market in Rest of APAC by Application 2020–2026 (\$ billion)

Table 266 Consumer Flexible Packaging Market in Rest of APAC by End-user 2020?2026 (\$ million)

Table 267 Europe Flexible Packaging Market by Material 2020?2026 (\$ billion)

Table 268 Europe Flexible Packaging Market by Product 2020?2026 (\$ billion)

Table 269 Europe Flexible Packaging Market by Application 2020?2026 (\$ billion)

Table 270 Europe Consumer Flexible Packaging Market by End-user 2020–2026 (\$ billion)

Table 271 Flexible Packaging Market in Germany by Material 2020?2026 (\$ billion)

Table 272 Flexible Packaging Market in Germany by Product 2020?2026 (\$ billion)

Table 273 Flexible Packaging Market in Germany by Application 2020?2026 (\$ billion)

Table 274 Consumer Flexible Packaging Market in Germany by End-user 2020?2026 (\$ billion)

Table 275 Flexible Packaging Market in France by Material 2020?2026 (\$ billion)

Table 276 Flexible Packaging Market in France by Product 2020?2026 (\$ billion)

Table 277 Flexible Packaging Market in France by Application 2020?2026 (\$ billion)

Table 278 Consumer Flexible Packaging Market in France by End-user 2020?2026 (\$ billion)

Table 279 Flexible Packaging Market in UK by Material 2020?2026 (\$ billion)

Table 280 Flexible Packaging Market in UK by Product 2020?2026 (\$ billion)

Table 281 Flexible Packaging Market in UK by Application 2020?2026 (\$ billion)

Table 282 Consumer Flexible Packaging Market in UK by End-user 2020?2026 (\$ million)

Table 283 Flexible Packaging Market in Italy by Material 2020?2026 (\$ billion)

Table 284 Flexible Packaging Market in Italy by Product 2020?2026 (\$ billion)

Table 285 Flexible Packaging Market in Italy by Application 2020?2026 (\$ billion)

Table 286 Consumer Flexible Packaging Market in Italy by End-user 2020?2026 (\$ million)

Table 287 Flexible Packaging Market in Benelux by Material 2020?2026 (\$ million)

Table 288 Flexible Packaging Market in Benelux by Product 2020?2026 (\$ million)

Table 289 Flexible Packaging Market in Benelux by Application 2020?2026 (\$ million)

Table 290 Consumer Flexible Packaging Market in Benelux by End-user 2020?2026 (\$ million)

Table 291 Flexible Packaging Market in Spain by Material 2020?2026 (\$ million)

Table 292 Flexible Packaging Market in Spain by Product 2020?2026 (\$ million)

Table 293 Flexible Packaging Market in Spain by Application 2020?2026 (\$ million)

Table 294 Consumer Flexible Packaging Market in Spain by End-user 2020?2026 (\$ million)

Table 295 Flexible Packaging Market in Austria by Material 2020?2026 (\$ million)

Table 296 Flexible Packaging Market in Austria by Product 2020?2026 (\$ million)

Table 297 Flexible Packaging Market in Austria by Application 2020?2026 (\$ million)

Table 298 Consumer Flexible Packaging Market in Austria by End-user 2020?2026 (\$ million)

Table 299 Flexible Packaging Market in Scandinavia by Material 2020?2026 (\$ million)

Table 300 Flexible Packaging Market in Scandinavia by Product 2020?2026 (\$ million)

Table 301 Flexible Packaging Market in Scandinavia by Application 2020?2026 (\$ million)

Table 302 Consumer Flexible Packaging Market in Scandinavia by End-user 2020?2026 (\$ million)

Table 303 Flexible Packaging Market in Switzerland by Material 2020?2026 (\$ million)

Table 304 Flexible Packaging Market in Switzerland by Product 2020?2026 (\$ million)

Table 305 Flexible Packaging Market in Switzerland by Application 2020?2026 (\$ million)

Table 306 Consumer Flexible Packaging Market in Switzerland by End-user 2020?2026 (\$ million)

Table 307 Flexible Packaging Market in Rest of Europe by Material 2020?2026 (\$ million)

Table 308 Flexible Packaging Market in Rest of Europe by Product 2020?2026 (\$ million)

Table 309 Flexible Packaging Market in Rest of Europe by Application 2020?2026 (\$ million)

Table 310 Consumer Flexible Packaging Market in Rest of Europe by End-user 2020?2026 (\$ million)

Table 311 North America Flexible Packaging Market by Material 2020?2026 (\$ billion)

Table 312 North America Flexible Packaging Market by Product 2020?2026 (\$ billion)

Table 313 North America Flexible Packaging Market by Application 2020?2026 (\$ billion)

Table 314 North America Consumer Flexible Packaging Market by End-user 2020?2026 (\$ billion)

Table 315 Flexible Packaging Market in US by Material 2020?2026 (\$ billion)

Table 316 Flexible Packaging Market in US by Product 2020?2026 (\$ billion)

Table 317 Flexible Packaging Market in US by Application 2020?2026 (\$ billion)

Table 318 Consumer Flexible Packaging Market in US by End-user 2020?2026 (\$ billion)

Table 319 Flexible Packaging Market in Canada by Material 2020?2026 (\$ billion)

Table 320 Flexible Packaging Market in Canada by Product 2020?2026 (\$ billion)

Table 321 Flexible Packaging Market in Canada by Application 2020?2026 (\$ billion)

Table 322 Consumer Flexible Packaging Market in Canada by End-user 2020?2026 (\$ billion)

Table 323 Latin America Flexible Packaging Market by Material 2020?2026 (\$ billion)

Table 324 Latin America Flexible Packaging Market by Product 2020?2026 (\$ billion)

Table 325 Latin America Flexible Packaging Market by Application 2020?2026 (\$ billion)

Table 326 Latin America Consumer Flexible Packaging Market by End-user 2020?2026 (\$ million)

Table 327 Flexible Packaging Market in Mexico by Material 2020?2026 (\$ billion)

Table 328 Flexible Packaging Market in Mexico by Product 2020?2026 (\$ million)

Table 329 Flexible Packaging Market in Mexico by Application 2020?2026 (\$ million)

Table 330 Consumer Flexible Packaging Market in Mexico by End-user 2020?2026 (\$ million)

Table 331 Flexible Packaging Market in Brazil by Material 2020?2026 (\$ million)
Table 332 Flexible Packaging Market in Brazil by Product 2020?2026 (\$ billion)
Table 333 Flexible Packaging Market in Brazil by Application 2020?2026 (\$ billion)
Table 334 Consumer Flexible Packaging Market in Brazil by End-user 2020?2026 (\$ million)
Table 335 Flexible Packaging Market in Argentina by Material 2020?2026 (\$ million)
Table 336 Flexible Packaging Market in Argentina by Product 2020?2026 (\$ million)
Table 337 Flexible Packaging Market in Argentina by Application 2020?2026 (\$ million)
Table 338 Consumer Flexible Packaging Market in Argentina by End-user 2020?2026 (\$ million)
Table 339 Flexible Packaging Market in Chile by Material 2020?2026 (\$ million)
Table 340 Flexible Packaging Market in Chile by Product 2020?2026 (\$ million)
Table 341 -Flexible Packaging Market in Chile by Application 2020 – 2026 (\$ million)
Table 342 Consumer Flexible Packaging Market in Chile by End-user 2020?2026 (\$ million)
Table 343 Flexible Packaging Market in Rest of Latin America by Material 2020?2026 (\$ million)
Table 344 Flexible Packaging Market in Rest of Latin America by Product 2020?2026 (\$ million)
Table 345 Flexible Packaging Market in Rest of Latin America by Application 2020?2026 (\$ million)
Table 346 Consumer Flexible Packaging Market in Rest of Latin America by End-user 2020?2026 (\$ million)
Table 347 Middle East & Africa Flexible Packaging Market by Material 2020?2026 (\$ million)
Table 348 Middle East & Africa Flexible Packaging Market by Product 2020?2026 (\$ million)
Table 349 Middle East & Africa Flexible Packaging Market by Application 2020?2026 (\$ million)
Table 350 Middle East & Africa Consumer Flexible Packaging Market by End-user 2020?2026 (\$ million)
Table 351 Flexible Packaging Market in Turkey by Material 2020?2026 (\$ million)
Table 352 Flexible Packaging Market in Turkey by Product 2020?2026 (\$ million)
Table 353 Flexible Packaging Market in Turkey by Application 2020?2026 (\$ million)
Table 354 Consumer Flexible Packaging Market in Turkey by End-user 2020?2026 (\$ million)
Table 355 Flexible Packaging Market in Egypt by Material 2020?2026 (\$ million)
Table 356 Flexible Packaging Market in Egypt by Product 2020?2026 (\$ million)
Table 357 Flexible Packaging Market in Egypt by Application 2020?2026 (\$ million)

Table 358 Consumer Flexible Packaging Market in Egypt by End-user 2020?2026 (\$ million)

Table 359 Flexible Packaging Market in Saudi Arabia by Material 2020?2026 (\$ million)

Table 360 Flexible Packaging Market in Saudi Arabia by Product 2020?2026 (\$ million)

Table 361 Flexible Packaging Market in Saudi Arabia by Application 2020?2026 (\$ million)

Table 362 Consumer Flexible Packaging Market in Saudi Arabia by End-user 2020?2026 (\$ million)

Table 363 Flexible Packaging Market in South Africa by Material 2020?2026 (\$ million)

Table 364 Flexible Packaging Market in South Africa by Product 2020?2026 (\$ million)

Table 365 Flexible Packaging Market in South Africa by Application 2020?2026 (\$ million)

Table 366 Consumer Flexible Packaging Market in South Africa by End-user 2020?2026 (\$ million)

Table 367 Flexible Packaging Market in UAE by Material 2020?2026 (\$ million)

Table 368 Flexible Packaging Market in UAE by Product 2020?2026 (\$ million)

Table 369 Flexible Packaging Market in UAE by Application 2020?2026 (\$ million)

Table 370 Consumer Flexible Packaging Market in UAE by End-user 2020?2026 (\$ million)

Table 371 Flexible Packaging Market in Rest of MEA by Material Type 2020?2026 (\$ million)

Table 372 Flexible Packaging Market in Rest of MEA by Product 2020?2026 (\$ million)

Table 373 Flexible Packaging Market in Rest of MEA by Application 2020?2026 (\$ million)

Table 374 Consumer Flexible Packaging Market in Rest of MEA by End-user 2020?2026 (\$ million)

Table 375 Global Flexible Packaging Market by Product 2020?2026 (\$ billion)

Table 376 Global Flexible Packaging Market by Product 2020?2026 (Revenue %)

Table 377 Global Flexible Packaging Market by Material 2020?2026 (\$ billion)

Table 378 Global Flexible Packaging Market by Material 2020?2026 (Revenue %)

Table 379 Global Flexible Packaging Market by Application 2020?2026 (\$ billion)

Table 380 Global Flexible Packaging Market by Application 2020?2026 (Revenue %)

Table 381 Global Flexible Packaging Market by Flexible Plastic 2020-2026 (million tons)

Table 382 Global Flexible Packaging Market by Flexible Plastic 2020?2026 (volume %)

Table 383 Global Flexible Packaging Market by Printing 2020?2026 (billion units)

Table 384 Global Flexible Packaging Market by Printing 2020?2026 (Volume %)

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