

Global Industrial Packaging Market: Analysis By Material Type (Corrugated Boxes, Intermediate Bulk Containers (IBC), Sacks, Drums, Pails, Crates and Others), By End User (Food & Beverages, Chemicals & Pharmaceuticals, Building & Construction, Agriculture & Horticulture, Plastics & Rubber, Oil & Lubricants and Others), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2028

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Abstracts

The global industrial packaging market was valued at US\$65.62 billion in 2022. The market value is forecasted to grow to US\$88.03 billion by 2028. Industrial packaging refers to specific, heavy-duty customized packing solutions that are designed for wrapping, containing, & sealing finished fast-moving consumer goods (FMCG) during storage and distribution procedures. Industrial packaging market consists of sales of industrial packaging solutions by entities (organizations, sole traders and partnerships) that help in preparing goods for transport, warehousing, logistics, sales & end use and safeguarding the products from any damage or contamination.

Packaging formats in this industrial sector include drums (steel, plastic and fiber), intermediate bulk containers (IBCs, flexible and rigid), sacks, pails and crates/totes. Economic growth is the principal driver of industrial packaging usage and in particular the health of the key industries it serves. Development in the industrial packaging market focuses primarily on sustainability, recycling and reuse/reconditioning. As in many of the consumer packaging formats, down-gauging is an important driver of innovation, reducing the material used while maintaining performance. Increasing re-use of containers and establishment of an infrastructure for reconditioned drums are

also factors promoting sustainable solutions in industrial packaging as well as business opportunities. The market is anticipated to grow at a CAGR of approx. 5% during the forecasted period of 2023-2028.

Market Segmentation Analysis:

By Material Type: The report provides the bifurcation of the market into seven segments based on material type: corrugated boxes, intermediate bulk containers (IBC), sacks, drums, pails, crates and others. Corrugated boxes industrial packaging market is both the largest and fastest growing segment of global industrial packaging market as corrugated box packaging are ideal for packing a wide variety of items that are independent of size & form and offers other benefits such as modification and customization of boxes to meet specific company requirements.

By End User: The report provides the bifurcation of the market into seven segments based on end user: food & beverages, chemicals & pharmaceuticals, building & construction, agriculture & horticulture, plastics & rubber, oil & lubricants and others. Food and beverages industrial packaging market held the largest share of global industrial packaging market in 2022, owing to rapidly expanding population, rapid urbanization, shift in consumer's preference towards consumption of packaged & processed food, rising demand for customized industrial packaging & increased sales of daily essentials, FMCG, and fresh food through e-commerce and online platforms.

By Region: The report provides insight into the industrial packaging market based on the regions namely North America, Europe, Asia Pacific and rest of the world. The Asia Pacific industrial packaging market in the largest & fastest growing region of global industrial packaging market owing to growing working population, rise in currency rates, increasing e-commerce sales, rising per capita income of individuals and increased benefits offered by industrial packaging solutions in the form of safety, cost effectiveness, durability, strength, environmental friendliness and logistics convenience.

The Asia Pacific industrial packaging market is divided into five regions on the basis of geographical operations, namely, China, Japan, India, South Korea and Rest of Asia Pacific, where China industrial packaging market held the largest share in Asia Pacific industrial packaging market owing to massive demand from the food packaging industry, increasing retail sales of grain, oil, and food & beverages, quick adoption of technological advancements and stable growth in industries such as automotive, construction and healthcare.

Also, on the basis of end user, Asia Pacific industrial packaging market is divided into five segments namely, food & beverages, chemicals & pharmaceuticals, building & construction, oil & lubricants and others, where chemicals & pharmaceuticals is the fastest growing segment of Asia Pacific industrial packaging market and food & beverages held the largest share of Asia Pacific industrial packaging market in 2022.

Market Dynamics:

Growth Drivers: The global industrial packaging market has been growing over the past few years, due to factors such as rising demand from end user industries, rapid urbanization, rise in modern retailing, increasing e-commerce, globalization, etc. Industrial packaging in addition to ensuring safety and protection of goods from damage and contamination, is also used for advertising and branding of products by various companies and organizations. Industrial packaging are often labeled in the same way that resembles commercial packing done by various companies, having a positive effect on company's brand visibility & attention. There is an increasing demand for industrial packaging services as a result of increasing retail outlets and rise in modern retailing, boosting the demand and hence the growth of global industrial packaging market.

Challenges: However, the market growth would be negatively impacted by various challenges such as volatility in raw material prices, recycling & environmental concerns, etc. There has been increasing fluctuations in supply of raw materials & basic chemicals that are used in production and manufacturing of packaging materials. For instance, crude oil and natural gas are major sources of naphtha and ethylene which are used to manufacture polypropylene, polystyrene, EPS Styrofoam, polyethylene & polyurethane, used as raw materials in the manufacturing of insulated packaging. So, with fluctuating prices of crude oil and increasing cost of raw materials, the prices of industrial packaging is also increasing, impeding the growth of global industrial packaging market.

Trends: The market is projected to grow at a fast pace during the forecasted period, due to various latest trends such as increased integration of artificial intelligence (AI), emergence of sustainable and recyclable packaging materials, increasing adoption of nanotechnology, advancements in supply chains, etc. Artificial intelligence is helping industrial packaging firms in employing advanced algorithms in the areas of inspection, data labelling, recycling waste, etc. to produce better packaging solutions for various end user industries. Also, companies are increasingly using AI-assisted robots for carrying out monotonous packaging processes like picking, placing, palletizing, & inspection and with many startups developing AI-powered vision systems that take pictures of finished goods to analyze the package quality and automate the process of

product sorting & quality control, the overall growth of industrial packaging market is expected to rise in the forecasted period of 2023-2028.

Impact Analysis of COVID-19 and Way Forward:

COVID-19 brought in many changes in the world in terms of reduced productivity, loss of life, business closures, closing down of factories and organizations, and shift to an online mode of work. Lockdown policies, imposed by the government to prevent the spread of virus forced various end user industries to either shut down or run low on production capacity, resulting in lower production of various goods by end user industries and since end user industries including building & construction, oil & lubricants, agriculture etc. demand bulk packaging services and effective industrial packaging solutions for safe transportation of goods, there was a sudden fall in the demand for industrial packaging services as a result of reduced production, impeding the growth of global industrial packaging market during the period, 2019-2020.

Competitive Landscape:

The market for industrial packaging has been fragmented due to presence of numerous international, regional and local vendors. Local manufacturers of industrial packaging products cater to unique and innovative solutions at a lower price as compared to the international vendors, usually resulting in price battles between different players of the market. The key players of the market are:

Amcor PLC (Bemis Company, Inc.)

Grief, Inc.

Berry Global Group, Inc.

Mondi PLC

Sonoco Products Company

International Paper Company

WestRock Company

Packaging Corporation of America (PCA)

Orora Limited (Orora Packaging Solutions)

Sealed Air Corporation

NEFAB Group AB

Global-Pak, Inc.

BAG Corporation

Product launches, mergers & acquisitions and partnership & collaborations are the main strategies which are adopted by market players in industrial packaging market to expand market share and gain competitive advantage. For instance, On December 21, 2022, Amcor PLC announced that Amcor Australia & New Zealand (ANZ) business had signed a Memorandum of Understanding (MOU) with Australian-based technology pioneers, Licella Holdings, to invest in one of Australia's first plastic advanced recycling facilities. Similarly, On December 15, 2022, Greif, Inc. announced that the company has completed the acquisition of Lee Container Corporation, Inc. ("Lee").

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