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Barrier Materials Market Report by Type (Polyvinylidene Chloride (PVDC), Ethylene Vinyl Alcohol (EVOH), Polyethylene Naphthalate (PEN), and Others), End Use Industry (Pharmaceutical, Food and Beverage, Agriculture, Cosmetics, Automotive, and Others), and Region 2024-2032

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Abstracts

The global barrier materials market size reached US$ 3.1 Billion in 2023. Looking forward, IMARC Group expects the market to reach US$ 4.8 Billion by 2032, exhibiting a growth rate (CAGR) of 4.7% during 2024-2032. The increasing product utilization in the packaging industry, implementation of stringent regulatory requirements, rapid technological advancements in barrier materials, and the widespread product utilization in the automotive industry are some of the major factors propelling the market.

Barrier materials refer to advanced packaging materials used to prevent the permeation of gases, aromas, or liquids. It includes plastic films, metal foils, coatings, and laminates. They are widely used to maintain product quality, prolong shelf life, and ensure consumer safety. They are cost-effective, versatile, and highly effective materials that exhibit superior properties, including high resistance to penetration by moisture, oxygen, light, and microorganisms. They also minimize the risk of spoilage, degradation, and contamination, ensuring that products reach consumers in optimal condition.

The widespread product utilization in the fuel systems and battery packs of automotives is propelling the market growth. Furthermore, the increasing product utilization in consumer electronics to ensure the longevity and performance of smartphones, tablets, laptops, computers, watches, and wearables is boosting the market growth.

Additionally, the adoption of advanced manufacturing processes that support the production of more efficient products is positively influencing the market growth. Moreover, increasing product adoption in the agriculture industry to design controlled-environment agriculture (CEA) setups, such as greenhouses, is strengthening the market growth. Other factors, including rapid industrialization, extensive research and development (R&D) activities, and the growing demand for sustainable products, are anticipated to drive the market growth.

Barrier Materials Market Trends/Drivers:

The increasing product utilization in the packaging industry

The significant growth in the packaging industry is one of the key factors fueling the market. This surge is primarily driven by the food and beverage sector, where barrier materials are used to maintain freshness, prevent contamination, and extend shelf-life. Additionally, the widespread product utilization in pharmaceutical manufacturing to protect drugs from environmental conditions, thus maintaining their potency and ensuring patient safety, is positively influencing the market growth. Moreover, the consumer electronics industry is also significantly contributing to the market growth. In line with this, electronic devices require high-performance materials to prevent moisture ingress, thereby reducing the risk of corrosion and device failure. Apart from this, the rapid urbanization activities, coupled with growing consumer expectations for quality, safety, and longevity in products, are strengthening the market growth.

The implementation of stringent regulatory requirements

Regulatory requirements play a crucial role in driving the market. Various governments and international regulatory bodies are enforcing stringent packaging standards to ensure the quality, safety, and longevity of products. In line with this, the imposition of rigorous standards in food and pharmaceutical packaging to prevent contamination and ensure product integrity is facilitating the adoption of effective products. Furthermore, regulations aiming to reduce environmental impact, such as those limiting single-use plastics, are pushing companies to explore and invest in sustainable products.

Rapid technological advancements in barrier materials

Technological advancements have revolutionized the market by creating materials that offer superior performance and versatility. Cutting-edge technologies in polymer engineering, nanotechnology, and material science have led to the development of novel products, demonstrating improved resistance to gas and moisture transmission, better durability, and improved flexibility. In line with this, the introduction of active and intelligent packaging technologies that monitor and extend product shelf-life is gaining traction. Furthermore, the recent development and commercialization of new materials, such as bio-based and biodegradable materials that are eco-friendly, reduce waste generation, and reduce adverse impact on wildlife, is acting as another growth-inducing factor. Additionally, the introduction of lightweight barrier materials, which reduce overall packaging costs and supports green and sustainable practices, is contributing to the market growth.

Barrier Materials Industry Segmentation:
IMARC Group provides an analysis of the key trends in each segment of the global barrier materials market report, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on type and end use industry.

Breakup by Type:

Polyvinylidene Chloride (PVDC)
Ethylene Vinyl Alcohol (EVOH)
Polyethylene Naphthalate (PEN)
Others

Polyvinylidene chloride (PVDC) dominates the market

The report has provided a detailed breakup and analysis of the market based on the type. This includes polyvinylidene chloride (PVDC), ethylene vinyl alcohol (EVOH), polyethylene naphthalate (PEN), and others. According to the report, polyvinylidene chloride (PVDC) represented the largest market segment.

PVDC exhibits excellent barrier properties towards oxygen and moisture, which aids in preserving the freshness, flavor, aroma, and quality of various food and beverage products. Furthermore, it minimizes oxygen and moisture permeation, which assists in inhibiting oxidation, microbial growth, and other degradation processes that can compromise product quality and safety. Additionally, PVDC can be used in various packaging formats, including flexible films, laminates, and coatings. Its versatility allows for the packaging of a diverse range of products, from dry goods to liquid beverages. Moreover, it offers excellent transparency and clarity, allowing consumers to see the product inside the packaging. Apart from this, PVDC exhibits excellent heat sealability, making them compatible with various sealing methods commonly used in the packaging industry.

Breakup by End Use Industry:

Pharmaceutical
Food and Beverage
Agriculture
Cosmetics
Automotive
Others

Food and beverage dominate the market

The report has provided a detailed breakup and analysis of the market based on the distribution channel. This includes pharmaceutical, food and beverage, agriculture, cosmetics, automotive, and others. According to the report, food and beverage represented the largest market segment.

Barrier materials are crucial in the food and beverage (F&B) industry to ensure product protection and safety. These materials act as a shield, preventing external elements, such as moisture, oxygen, light, and contaminants, from affecting the quality, taste, and freshness of food and beverages. Furthermore, consumers are increasingly seeking convenient, ready-to-eat (RTE), and packaged food and beverage products. This demand for packaged goods necessitates the use of barrier materials to preserve the quality, nutritional value, and sensory attributes of the products. Additionally, they aid in extending the shelf life of perishable food products by inhibiting bacterial growth and minimizing exposure to oxygen, moisture, and light. Moreover, they enable the production of lightweight and flexible packaging for edible products that are easy to handle, transport, and store.

Breakup by Region:

North America
United States
Canada
Asia Pacific
China
Japan
India

South Korea
Australia
Indonesia
Others
Europe
Germany
France
United Kingdom
Italy
Spain
Russia
Others
Latin America
Brazil
Mexico
Others
Middle East and Africa

Asia Pacific exhibits a clear dominance in the market, accounting for the largest barrier materials market share

The report has also provided a comprehensive analysis of all the major regional markets, which includes North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific represented the largest market segment.

Asia Pacific holds the majority market share due to increased industrialization, urbanization, and a rise in disposable incomes, which in turn drives the demand for barrier materials across various industries. Furthermore, the changing lifestyles have resulted in increased consumption of packaged goods, including food, beverages, personal care products, and pharmaceuticals, which is facilitating the product demand to ensure product safety, quality, and extended shelf life. Additionally, Asia Pacific is a hub for manufacturing and industrial activities, such as food and beverage, healthcare, electronics, automotive, and agriculture. These industries require barrier materials for packaging and protecting products from moisture, oxygen, light, and other environmental factors. Moreover, the implementation of supportive policies by the regional governments to promote infrastructure development, industrial growth, and sustainability is contributing to the market growth.

Competitive Landscape:

The top companies are investing in research and development (R&D) to innovate and develop new products with enhanced properties, such as improved barrier performance, sustainability, and cost-effectiveness. Furthermore, several key players are expanding their product portfolios to cater to a wide range of industries and applications. They are identifying new market segments and customizing their products to address specific needs in sectors such as food packaging, healthcare, electronics, and automotive. Besides this, the growing environmental concerns have prompted leading companies to develop eco-friendly and recyclable barrier materials. Manufacturers are striving to reduce the environmental impact of their products by utilizing renewable resources, implementing recycling initiatives, and promoting circular economy principles. Moreover, companies are forming strategic partnerships with other industry players, suppliers, and customers to leverage complementary strengths, access new markets, and enhance their overall competitiveness.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

3M Company
Arkema Group
Asahi Kasei Corporation
Chang Chun Petrochemical Co., Ltd.
Kuraray Co., Ltd.
Kureha Corporation
Mondi plc
Solvay SA
Teijin Limited
The Dow Chemical Company.

Recent Developments:

In June 2021, Asahi Kasei Corporation announced its plans to expand its e-commerce business in India to increase sales of its premium wrap, frying pan foil, and cooking sheets, known for their excellent barrier property.

In February 2023, Kuraray Co., Ltd. introduced a new grade of Plantic, the company’s plant-based, high-performance barrier material.

In January 2023, Mondi Plc announced the expansion of its innovative range of medium, high, and very high-barrier paper-based packaging.

Key Questions Answered in This Report:

How has the global barrier materials market performed so far, and how will it perform in the coming years?

What are the drivers, restraints, and opportunities in the global barrier materials market?

What is the impact of each driver, restraint, and opportunity on the global barrier materials market?

What are the key regional markets?

Which countries represent the most attractive barrier materials market?

What is the breakup of the market based on the type?

Which is the most attractive type in the barrier materials market?

What is the breakup of the market based on the end use?

Which is the most attractive end use in the barrier materials market?

What is the competitive structure of the global barrier materials market?

Who are the key players/companies in the global barrier materials market?

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