

# **Biodegradable Packaging Market Report by Material Type (Plastic, Paper), Application (Food Packaging, Beverage Packaging, Pharmaceutical Packaging, Personal/Homecare Packaging, and Others), and Region 2024-2032**

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## **Abstracts**

The global biodegradable packaging market size reached US\$ 101.7 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 166.2 Billion by 2032, exhibiting a growth rate (CAGR) of 5.45% during 2024-2032. The heightened consumer awareness of environmental impacts associated with traditional packaging materials, escalating product demand from retailers, stringent governmental policies against single-use plastics, and the rising urgency to mitigate climate change represent some of the factors that are propelling the market.

Biodegradable packaging is a type of material designed to decompose naturally, returning to the environment in the form of water, carbon dioxide, and organic matter. Comprising primarily plant-based materials such as starch and cellulose, these packaging solutions offer a sustainable alternative to traditional plastic and paper-based options. They are engineered to undergo degradation more rapidly when subjected to natural elements, effectively minimizing the ecological footprint of the products they encase. With characteristics such as low toxicity, reduced waste, and zero harmful emissions, biodegradable packaging often leverages the action of microorganisms to expedite decomposition. It serves as a significant tool for waste management, especially in industries that prioritize ecological responsibility. In terms of functionality, biodegradable packaging effectively safeguards the quality of the products it houses, while ensuring a limited environmental impact.

The global market is primarily driven by a heightened consumer awareness of

environmental impacts associated with traditional packaging materials. In line with this, stringent governmental policies against single-use plastics are compelling industries to seek sustainable alternatives. Moreover, advancements in material science have resulted in cost-effective, eco-friendly packaging solutions. In addition to this, the proliferation of e-commerce activities is generating the need for more sustainable shipping and packaging options. Also, collaborations and partnerships at a global scale are facilitating knowledge transfer and innovation in this sector. The market is further bolstered by an upward trend in corporate social responsibility initiatives, which prioritize eco-friendly operations. Apart from this, waste management programs that endorse recycling and composting are accelerating the market's acceptance rates. Additional contributors to the market's expansion include the inflating disposable income, international trade policies enabling easier global distribution of sustainable packaging solutions, and extensive research and development (R&D) activities.

#### Biodegradable Packaging Market Trends/Drivers:

##### Rising urgency to mitigate climate change

The urgency to mitigate the impacts of climate change stands as a foundational driving factor in the global market for biodegradable packaging. Climate change poses existential threats that are compelling policymakers, activists, and citizens alike to seek alternatives that reduce carbon footprint and waste. Traditional packaging solutions, especially those made from petroleum-based plastics, have come under scrutiny for their long-lasting negative effects on the environment. These materials often end up in landfills, take centuries to degrade, and contribute to greenhouse gas emissions. The quest for sustainability is moving beyond rhetoric to actionable measures, thus becoming a commercial imperative. Companies, aiming to align their business practices with global sustainability goals, are increasingly leaning towards biodegradable packaging solutions as a tangible step towards achieving those objectives. In this context, biodegradable packaging becomes more than a choice; it signifies a commitment to a global cause. This level of commitment not only positions companies as socially responsible but also resonates with a growing consumer base that is increasingly aware and concerned about the environmental impacts of their purchasing decisions.

##### Escalating demand from retailers for environmentally friendly packaging

The escalation of demands from retailers for environmentally friendly packaging is another driving factor that cannot be underestimated. Retailers wield significant influence over consumer choices and are, in many ways, the gatekeepers of product

placement and visibility. Sustainability has made its way into the evaluation metrics of retail businesses, often becoming a factor as critical as price and quality. As a result, manufacturers find themselves in a position where the adoption of biodegradable packaging becomes not merely an option but a necessity for market survival. Retailers, for their part, are responding to both consumer expectations and regulatory pressures to ensure that their supply chains are environmentally responsible. Those that meet these evolving standards stand to benefit from better shelf positioning, promotional support, and in some cases, even financial incentives. The symbiosis between retailers and manufacturers thus further propels the demand for biodegradable packaging solutions.

#### An enhanced emphasis on holistic supply chain sustainability

Increasing emphasis on holistic supply chain sustainability represents another pivotal driving force for the market. In a rapidly globalizing world, companies are no longer judged solely based on the end product but the entire value chain that brings it to market. This scrutiny extends from sourcing of raw materials to production, distribution, and finally, disposal. With this expansive view, the need for packaging that either decomposes naturally or can be efficiently recycled has intensified. Supply chain sustainability has transcended from being a niche concern to a key business imperative. Stakeholders at all levels of the supply chain, from suppliers to distributors and retailers, are now accountable for the environmental footprint of the products. As a result, organizations are rigorously reviewing and revising their operations to integrate more sustainable practices, including the adoption of biodegradable packaging. This transition is, in turn, accelerating market growth by embedding demand for these materials at multiple points within the supply chain.

#### Biodegradable Packaging Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global biodegradable packaging market report, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on material type and application.

#### Breakup by Material Type:

Plastic

Starch-based Plastics

Cellulose-based Plastics

Polylactic Acid (PLA)

Poly-3-Hydroxybutyrate (PHB)

Polyhydroxyalkanoates (PHA)

Others

Paper

Kraft Paper

Flexible Paper

Corrugated Fiberboard

Boxboard

Paper represents the largest market segment

The report has provided a detailed breakup and analysis of the market based on the material type. This includes plastic (starch-based plastics, cellulose-based plastics, polylactic acid (PLA), poly-3-hydroxybutyrate (PHB), polyhydroxyalkanoates (PHA), and others) and paper (kraft paper, flexible paper, corrugated fiberboard, boxboard).

According to the report, paper represented the largest segment.

The paper segment is majorly driven by growing consumer demand for eco-friendly packaging solutions. Regulatory initiatives, such as bans on single-use plastics, have propelled the market toward paper-based alternatives. The segment also benefits from technological advancements, which have improved the durability and functionality of paper packaging. In addition, the ease of recycling paper contributes to its appeal as a sustainable option. The rise in e-commerce has also led to increased demand for paper-based packaging, solidifying its major market share.

On the other hand, for the plastic segment, one of the key drivers include increased environmental awareness among consumers. Regulatory changes, particularly stringent measures against non-biodegradable plastics, also contribute to growth. Innovations in biodegradable plastic technology are another critical factor that is influencing the segment growth.

Breakup by Application:

Food Packaging

Beverage Packaging

Pharmaceutical Packaging

Personal/Homecare Packaging

Others

Food packaging accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the application. This includes food packaging, beverage packaging, pharmaceutical packaging, personal/homecare packaging and others. According to the report, food packaging represented the largest segment.

In the food packaging sector, safety concerns regarding food contamination from non-biodegradable materials have led to a rise in demand for biodegradable packaging. Moreover, consumer preference for natural and organic products extends to packaging, adding momentum to the segment. Enhanced preservation technologies have made it possible to maintain food quality for longer periods, increasing the acceptability of biodegradable food packaging. The growth of the organic food market also necessitates eco-friendly packaging solutions. Finally, stringent food safety regulations in various countries are compelling manufacturers to adopt biodegradable packaging.

For beverage packaging, sustainability initiatives by major beverage companies are driving the shift to biodegradable options. Consumer pressure and community awareness regarding plastic waste in oceans and landfills are also significant factors. In pharmaceuticals, the drive toward biodegradable packaging is motivated by the need for safer, non-toxic materials. Government regulations often require eco-friendly alternatives for medical packaging. For personal and homecare products, consumer preference for eco-friendly and non-toxic packaging options is a strong driver. Brands are increasingly adopting sustainable practices to meet consumer demands and to align with their corporate social responsibility objectives.

#### 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

Europe exhibits a clear dominance, accounting for the largest biodegradable packaging market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include 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, Europe accounted for the largest market share.

The European market for biodegradable packaging is experiencing robust growth, which is largely propelled by stringent regulations against single-use plastics and other non-biodegradable materials. EU policies such as the Circular Economy Action Plan provide a strategic framework that encourages sustainable packaging.

In addition to this, many member states have implemented local laws that favor biodegradable packaging, which is further incentivizing the market. Consumer awareness and advocacy for environmental sustainability are exceptionally high in Europe, thereby creating a conducive environment for market growth in the region.

The presence of established packaging companies in the region, many of which are investing in R&D for sustainable materials, also fosters growth. Furthermore, strong import-export relationships within the European Union facilitate the dissemination of biodegradable packaging solutions, consolidating Europe's position in the global market.

### Competitive Landscape:

Leaders in the global biodegradable packaging market are working on developing new materials that break down naturally without causing environmental harm. These companies are collaborating with scientists and researchers to explore innovative bio-based materials. Additionally, they are making strategic investments in manufacturing processes that can scale up the production of eco-friendly packaging solutions. Regulatory compliance is a significant focus, where they are working to meet the strict standards set for biodegradable materials. Furthermore, they are conducting life-cycle assessments to ensure that their products are genuinely sustainable from production to disposal. To expand their geographical reach, they are entering into collaborations with local distributors in emerging markets. They are also engaging with customers to understand their needs and fine-tuning their products accordingly.

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:

Amcor PLC  
Berkley International Packaging Limited  
Biopak PTY LTD  
Elevate Packaging Inc.  
Greenpack Limited  
International Paper Company  
Kruger Inc.  
Mondi Group  
Ranpak Holding Corporation  
Smurfit Kappa Group PLC  
Tetra Pak International SA  
Toray Plastics (America) Inc. (Toray Industries Inc)

### Recent Developments:

In August 2023, Amcor PLC announced the North American launch of curbside-recyclable AmFiber Performance Paper packaging, part of the company's AmFiber portfolio. Prequalified by How2Recycle, performance paper meets the repulpability standards for curbside recycling, allowing brands to provide consumers with more sustainable end-of-life outcomes for packaging.

In February 2021, Berkley International Packaging Limited's moulded fibre division, Berkley MF LLC was acquired by renewable fiber-based packaging products supplier International Paper. Following the deal, Berkley International will keep serving its

customers and continue sales of molded fiber products.

BioPak Pty Ltd, a subsidiary of Duni Group, has entered into a strategic agreement to divest 25% of its shares to Australian private equity firm Five V Capital. The partnership aims to accelerate BioPak's growth agenda and expand its market-leading presence in sustainable packaging solutions across existing and new markets.

### Key Questions Answered in This Report

1. What was the size of the global biodegradable packaging market in 2023?
2. What is the expected growth rate of the global biodegradable packaging market during 2024-2032?
3. What are the key factors driving the global biodegradable packaging market?
4. What has been the impact of COVID-19 on the global biodegradable packaging market?
5. What is the breakup of the global biodegradable packaging market based on the material type?
6. What is the breakup of the global biodegradable packaging market based on application?
7. What are the key regions in the global biodegradable packaging market?
8. Who are the key players/companies in the global biodegradable packaging market?



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