

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?

Contents

1 PREFACE

2 SCOPE AND METHODOLOGY

- 2.1 Objectives of the Study
- 2.2 Stakeholders
- 2.3 Data Sources
 - 2.3.1 Primary Sources
 - 2.3.2 Secondary Sources
- 2.4 Market Estimation
 - 2.4.1 Bottom-Up Approach
 - 2.4.2 Top-Down Approach
- 2.5 Forecasting Methodology

3 EXECUTIVE SUMMARY

4 INTRODUCTION

- 4.1 Overview
- 4.2 Key Industry Trends

5 GLOBAL BIODEGRADABLE PACKAGING MARKET

- 5.1 Market Overview
- 5.2 Market Performance
- 5.3 Impact of COVID-19
- 5.4 Market Forecast

6 MARKET BREAKUP BY MATERIAL TYPE

- 6.1 Plastic
 - 6.1.1 Market Trends
 - 6.1.2 Key Segments
 - 6.1.2.1 Starch-based Plastics
 - 6.1.2.2 Cellulose-based Plastics
 - 6.1.2.3 Polylactic Acid (PLA)
 - 6.1.2.4 Poly-3-Hydroxybutyrate (PHB)

6.1.2.5 Polyhydroxyalkanoates (PHA)

6.1.2.6 Others

6.1.3 Market Forecast

6.2 Paper

6.2.1 Market Trends

6.2.2 Key Segments

6.2.2.1 Kraft Paper

6.2.2.2 Flexible Paper

6.2.2.3 Corrugated Fiberboard

6.2.2.4 Boxboard

6.2.3 Market Forecast

7 MARKET BREAKUP BY APPLICATION

7.1 Food Packaging

7.1.1 Market Trends

7.1.2 Market Forecast

7.2 Beverage Packaging

7.2.1 Market Trends

7.2.2 Market Forecast

7.3 Pharmaceutical Packaging

7.3.1 Market Trends

7.3.2 Market Forecast

7.4 Personal/Homecare Packaging

7.4.1 Market Trends

7.4.2 Market Forecast

7.5 Others

7.5.1 Market Trends

7.5.2 Market Forecast

8 MARKET BREAKUP BY REGION

8.1 North America

8.1.1 United States

8.1.1.1 Market Trends

8.1.1.2 Market Forecast

8.1.2 Canada

8.1.2.1 Market Trends

8.1.2.2 Market Forecast

8.2 Asia-Pacific

8.2.1 China

8.2.1.1 Market Trends

8.2.1.2 Market Forecast

8.2.2 Japan

8.2.2.1 Market Trends

8.2.2.2 Market Forecast

8.2.3 India

8.2.3.1 Market Trends

8.2.3.2 Market Forecast

8.2.4 South Korea

8.2.4.1 Market Trends

8.2.4.2 Market Forecast

8.2.5 Australia

8.2.5.1 Market Trends

8.2.5.2 Market Forecast

8.2.6 Indonesia

8.2.6.1 Market Trends

8.2.6.2 Market Forecast

8.2.7 Others

8.2.7.1 Market Trends

8.2.7.2 Market Forecast

8.3 Europe

8.3.1 Germany

8.3.1.1 Market Trends

8.3.1.2 Market Forecast

8.3.2 France

8.3.2.1 Market Trends

8.3.2.2 Market Forecast

8.3.3 United Kingdom

8.3.3.1 Market Trends

8.3.3.2 Market Forecast

8.3.4 Italy

8.3.4.1 Market Trends

8.3.4.2 Market Forecast

8.3.5 Spain

8.3.5.1 Market Trends

8.3.5.2 Market Forecast

8.3.6 Russia

8.3.6.1 Market Trends

8.3.6.2 Market Forecast

8.3.7 Others

8.3.7.1 Market Trends

8.3.7.2 Market Forecast

8.4 Latin America

8.4.1 Brazil

8.4.1.1 Market Trends

8.4.1.2 Market Forecast

8.4.2 Mexico

8.4.2.1 Market Trends

8.4.2.2 Market Forecast

8.4.3 Others

8.4.3.1 Market Trends

8.4.3.2 Market Forecast

8.5 Middle East and Africa

8.5.1 Market Trends

8.5.2 Market Breakup by Country

8.5.3 Market Forecast

9 SWOT ANALYSIS

9.1 Overview

9.2 Strengths

9.3 Weaknesses

9.4 Opportunities

9.5 Threats

10 VALUE CHAIN ANALYSIS

11 PORTERS FIVE FORCES ANALYSIS

11.1 Overview

11.2 Bargaining Power of Buyers

11.3 Bargaining Power of Suppliers

11.4 Degree of Competition

11.5 Threat of New Entrants

11.6 Threat of Substitutes

12 PRICE ANALYSIS

13 COMPETITIVE LANDSCAPE

13.1 Market Structure

13.2 Key Players

13.3 Profiles of Key Players

13.3.1 Amcor PLC

13.3.1.1 Company Overview

13.3.1.2 Product Portfolio

13.3.2 Berkley International Packaging Limited

13.3.2.1 Company Overview

13.3.2.2 Product Portfolio

13.3.3 Biopak PTY LTD

13.3.3.1 Company Overview

13.3.3.2 Product Portfolio

13.3.4 Elevate Packaging Inc.

13.3.4.1 Company Overview

13.3.4.2 Product Portfolio

13.3.5 Greenpack Limited

13.3.5.1 Company Overview

13.3.5.2 Product Portfolio

13.3.6 International Paper Company

13.3.6.1 Company Overview

13.3.6.2 Product Portfolio

13.3.6.3 Financials

13.3.6.4 SWOT Analysis

13.3.7 Kruger Inc.

13.3.7.1 Company Overview

13.3.7.2 Product Portfolio

13.3.8 Mondi Group

13.3.8.1 Company Overview

13.3.8.2 Product Portfolio

13.3.8.3 Financials

13.3.8.4 SWOT Analysis

13.3.9 Ranpak Holding Corporation

13.3.9.1 Company Overview

13.3.9.2 Product Portfolio

13.3.9.3 Financials

- 13.3.9.4 SWOT Analysis
- 13.3.10 Smurfit Kappa Group PLC
 - 13.3.10.1 Company Overview
 - 13.3.10.2 Product Portfolio
 - 13.3.10.3 Financials
- 13.3.11 Tetra Pak International SA
 - 13.3.11.1 Company Overview
 - 13.3.11.2 Product Portfolio
 - 13.3.11.3 SWOT Analysis
- 13.3.12 Toray Plastics (America) Inc. (Toray Industries Inc)
 - 13.3.12.1 Company Overview
 - 13.3.12.2 Product Portfolio

List Of Tables

LIST OF TABLES

Table 1: Global: Biodegradable Packaging Market: Key Industry Highlights, 2023 and 2032

Table 2: Global: Biodegradable Packaging Market Forecast: Breakup by Material Type (in Million US\$), 2024-2032

Table 3: Global: Biodegradable Packaging Market Forecast: Breakup by Application (in Million US\$), 2024-2032

Table 4: Global: Biodegradable Packaging Market Forecast: Breakup by Region (in Million US\$), 2024-2032

Table 5: Global: Biodegradable Packaging Market: Competitive Structure

Table 6: Global: Biodegradable Packaging Market: Key Players

List Of Figures

LIST OF FIGURES

Figure 1: Global: Biodegradable Packaging Market: Major Drivers and Challenges

Figure 2: Global: Biodegradable Packaging Market: Sales Value (in Billion US\$), 2018-2023

Figure 3: Global: Biodegradable Packaging Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 4: Global: Biodegradable Packaging Market: Breakup by Material Type (in %), 2023

Figure 5: Global: Biodegradable Packaging Market: Breakup by Application (in %), 2023

Figure 6: Global: Biodegradable Packaging Market: Breakup by Region (in %), 2023

Figure 7: Global: Biodegradable Packaging (Plastic) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 8: Global: Biodegradable Packaging (Plastic) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 9: Global: Biodegradable Packaging (Paper) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 10: Global: Biodegradable Packaging (Paper) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 11: Global: Biodegradable Packaging (Food Packaging) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 12: Global: Biodegradable Packaging (Food Packaging) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 13: Global: Biodegradable Packaging (Beverage Packaging) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 14: Global: Biodegradable Packaging (Beverage Packaging) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 15: Global: Biodegradable Packaging (Pharmaceutical Packaging) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 16: Global: Biodegradable Packaging (Pharmaceutical Packaging) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 17: Global: Biodegradable Packaging (Personal/Homecare Packaging) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 18: Global: Biodegradable Packaging (Personal/Homecare Packaging) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 19: Global: Biodegradable Packaging (Other Applications) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 20: Global: Biodegradable Packaging (Other Applications) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 21: North America: Biodegradable Packaging Market: Sales Value (in Million US\$), 2018 & 2023

Figure 22: North America: Biodegradable Packaging Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 23: United States: Biodegradable Packaging Market: Sales Value (in Million US\$), 2018 & 2023

Figure 24: United States: Biodegradable Packaging Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 25: Canada: Biodegradable Packaging Market: Sales Value (in Million US\$), 2018 & 2023

Figure 26: Canada: Biodegradable Packaging Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 27: Asia-Pacific: Biodegradable Packaging Market: Sales Value (in Million US\$), 2018 & 2023

Figure 28: Asia-Pacific: Biodegradable Packaging Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 29: China: Biodegradable Packaging Market: Sales Value (in Million US\$), 2018 & 2023

Figure 30: China: Biodegradable Packaging Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 31: Japan: Biodegradable Packaging Market: Sales Value (in Million US\$), 2018 & 2023

Figure 32: Japan: Biodegradable Packaging Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 33: India: Biodegradable Packaging Market: Sales Value (in Million US\$), 2018 & 2023

Figure 34: India: Biodegradable Packaging Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 35: South Korea: Biodegradable Packaging Market: Sales Value (in Million US\$), 2018 & 2023

Figure 36: South Korea: Biodegradable Packaging Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 37: Australia: Biodegradable Packaging Market: Sales Value (in Million US\$), 2018 & 2023

Figure 38: Australia: Biodegradable Packaging Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 39: Indonesia: Biodegradable Packaging Market: Sales Value (in Million US\$),

2018 & 2023

Figure 40: Indonesia: Biodegradable Packaging Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 41: Others: Biodegradable Packaging Market: Sales Value (in Million US\$), 2018 & 2023

Figure 42: Others: Biodegradable Packaging Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 43: Europe: Biodegradable Packaging Market: Sales Value (in Million US\$), 2018 & 2023

Figure 44: Europe: Biodegradable Packaging Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 45: Germany: Biodegradable Packaging Market: Sales Value (in Million US\$), 2018 & 2023

Figure 46: Germany: Biodegradable Packaging Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 47: France: Biodegradable Packaging Market: Sales Value (in Million US\$), 2018 & 2023

Figure 48: France: Biodegradable Packaging Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 49: United Kingdom: Biodegradable Packaging Market: Sales Value (in Million US\$), 2018 & 2023

Figure 50: United Kingdom: Biodegradable Packaging Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 51: Italy: Biodegradable Packaging Market: Sales Value (in Million US\$), 2018 & 2023

Figure 52: Italy: Biodegradable Packaging Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 53: Spain: Biodegradable Packaging Market: Sales Value (in Million US\$), 2018 & 2023

Figure 54: Spain: Biodegradable Packaging Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 55: Russia: Biodegradable Packaging Market: Sales Value (in Million US\$), 2018 & 2023

Figure 56: Russia: Biodegradable Packaging Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 57: Others: Biodegradable Packaging Market: Sales Value (in Million US\$), 2018 & 2023

Figure 58: Others: Biodegradable Packaging Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 59: Latin America: Biodegradable Packaging Market: Sales Value (in Million US\$), 2018 & 2023

Figure 60: Latin America: Biodegradable Packaging Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 61: Brazil: Biodegradable Packaging Market: Sales Value (in Million US\$), 2018 & 2023

Figure 62: Brazil: Biodegradable Packaging Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 63: Mexico: Biodegradable Packaging Market: Sales Value (in Million US\$), 2018 & 2023

Figure 64: Mexico: Biodegradable Packaging Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 65: Others: Biodegradable Packaging Market: Sales Value (in Million US\$), 2018 & 2023

Figure 66: Others: Biodegradable Packaging Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 67: Middle East and Africa: Biodegradable Packaging Market: Sales Value (in Million US\$), 2018 & 2023

Figure 68: Middle East and Africa: Biodegradable Packaging Market: Breakup by Country (in %), 2023

Figure 69: Middle East and Africa: Biodegradable Packaging Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 70: Global: Biodegradable Packaging Industry: SWOT Analysis

Figure 71: Global: Biodegradable Packaging Industry: Value Chain Analysis

Figure 72: Global: Biodegradable Packaging Industry: Porter's Five Forces Analysis

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