

# **Flexible Packaging Market Assessment, By Material Type [Plastics, Paper, Aluminium Foil, Others], By Product Type [Pouches, Bags, Films, Wraps, Others], By End-user [Food & Beverages, Cosmetics & Personal Care, Pharmaceuticals, Household Care, Industrial, Others], By Region, Opportunities, and Forecast, 2016-2030F**

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## **Abstracts**

Flexible Packaging Market size was recorded at 31.7 million tons in 2022, which is expected to grow to 46.13 million tons in 2030 with a CAGR of 4.8% for the forecast period between 2023 and 2030. The flexible packaging sector is witnessing substantial growth propelled by key end-use industries such food and beverages and personal care. In the food and beverages sector, where product freshness and shelf life are paramount, further consumers seek packaging that maintains the quality and safety of the food while also being convenient and visually appealing. All these demands are met by flexible packaging by its ability to provide a protective barrier against external elements, ensuring the preservation of flavour, nutritional value, and freshness of perishable products.

Similarly, in the personal care sector, flexible packaging is highly utilized due to its versatility and adaptability to various product types such as lotions, creams, shampoos, and cosmetics. Personal care brands benefit from flexible packaging's customizable design options that enable differentiation and effective branding. Furthermore, the sustainability aspect is gaining traction in both these sectors, with consumers and brands seeking eco-friendly packaging solutions. Flexible packaging, being lightweight and often recyclable, aligns with sustainability goals and regulatory initiatives, appealing to environmentally conscious consumers. Additionally, the growth in e-commerce has

also significantly impacted the flexible packaging sector, especially in the context of these end-use industries.

### Rising Personal Care Demand to Drive the Need for Flexible Packaging

The beauty care sector is a significant catalyst driving the demand for flexible packaging in today's market. Flexible packaging contributes to aesthetically pleasing and innovative packaging designs to attract consumers and abets in demand efficient product protection and preservation. Additionally, flexible packing's lightweight and portable nature make it particularly suitable for the beauty care industry, aligning well with the consumer's desire for convenient usability. Furthermore, the industry's growing commitment to sustainability and the need to align with consumer preference is encouraging the adoption of eco-friendly flexible packaging solutions.

For instance, the beauty product sales in the United States increased by 10% in Q1 of 2023 compared to Q1 2022. The rising sales of beauty care commodities in several countries such as United States, India and China contributes to growing demand for flexible packaging.

### Strong Performance of Food and Beverages Sector Raises the Usage of Flexible Packaging

The growth of the flexible packaging market is significantly driven by the food and beverages sector. Flexible packaging provides consumers with convenient, lightweight, portable, eco-friendly, and recyclable solutions. Moreover, it offers effective barrier properties that extend the shelf life and maintain the freshness of food and beverage products. The rise of e-commerce in the food and beverage industry has further underscored the importance of flexible packaging, making it essential for durable and efficient transportation of products while maintaining their quality. Additionally, the cost-effectiveness and material savings associated with flexible packaging make it a favourable choice for manufacturers.

For instance, the total milk production in 2022 increased to 2,26,462 from 2,26,293 during 2021 in the United States. These growth in production rates of several food products increases the demand for flexible packaging across the globe.

### Stringent Food Safety Standards to Increase Flexible Packaging Demand

Flexible packaging manufacturers prioritize strict adherence to stringent food safety

regulations, ensuring the integrity and safety of food and beverage products. Additionally, manufacturers focus on developing packaging solutions that effectively extend the shelf life of perishable items. This proactive approach not only upholds quality but also plays a crucial role in reducing food waste, aligning with sustainability goals, and minimizing economic losses associated with discarded food products.

For instance, in July 2023, the European Union set new targets on food wastage, which is to achieve a 50% reduction in per capita food waste within retail and among consumers by 2030. These kind of target implementations in several EU countries is expected to raise the need for flexible packaging.

### Impact of COVID-19

The COVID-19 pandemic had a positive impact towards the flexible packaging market. At global scale, there was a notable increase in the demand for packaged food and beverages as individuals remained at home due to COVID related restrictions. This surge drove a higher production and consumption of flexible packaging within the food sector where consumers prioritized hygiene and convenience which led to a preference for single-use and smaller packaging designs driving flexible packaging demand during the pandemic. However, lockdowns, transportation limitations, and labour shortages affected production and distribution, leading to delays and shortages in the supply of flexible packaging materials and finished products.

### Future Outlook

The escalating global focus on sustainability objectives has spurred collaborative efforts to improve sustainable packaging materials. For instance, Mondi partnered with the French machinery manufacturer Thimonnier to develop an eco-friendly packaging solution that reduces plastic waste in April 2022.

Similarly, Berry Global and LyondellBasell joined forces to accelerate their objective of achieving 100% sustainable sourcing for customer-facing packaging by 2026. This collaboration aims to transition from plastic-lined paper cups, which have limited recyclability, to single-substrate, clear plastic drink cups, making recycling more accessible for a broader consumer base.

### Key Players Landscape and Outlook

Prominent players in the flexible packaging industry are strategically investing in and

introducing recyclable and environmentally sustainable solutions to meet the expanding consumer segment that prioritizes environment sustainability.

For instance, in February 2022, Mondi and Henkel have joined forces to introduce a fully recyclable mono-material refill pouch for Henkel's Pril brand. This initiative aligns with Henkel's business sustainability objectives of achieving 100% recyclability or reusability in its packaging and reducing fossil-based virgin plastic usage by 50% before the year 2025.

In April 2023, Yash Pakka Ltd., a compostable packaging industry pioneer announced the development of its first overseas plant in Guatemala, which is set to be operational by mid-2025. This plant will produce flexible packaging as one of its primary offerings.

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