

Barrier Resins Market by Type (PVDC, EVOH, PEN), Application (Food & Beverage, Pharmaceutical & Medical, Cosmetics, Agriculture, Industrial), and Region (Asia-Pacific, North America, Europe, South America, Middle East & Africa) - Global Forecast to 2026

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Abstracts

The barrier resins market exhibits high growth potential and is projected to reach a market size of USD 16.6 billion by 2026 from USD 12.4 billion in 2021, at a CAGR of 5.9 %. The market growth is being led by the ease of use and customization of barrier resins products. The growth is supported by increasing demand in food & beverage packaging industry and APAC as the largest market. The major drivers for the market are increased demand for barrier resins in various packaging industry namely Food & Beverage, cosmetics, pharmaceutical & medical and many more. Environmental regulations have restricted use of some resins in Europe and it may become an issue in other regions as well. Organic barrier resins are getting popular in the packaging industry and among consumers. There are various bio-based barrier resins available in the market, for instance, green materials such as sugarcane and bioplastics whose acceptance by a manufacturer as well as consumer may be a challenge.

“The largest segment in the market is PVDC”

PVDC has been a staple part of food packaging for a long time but in recent years alternatives for PVDC has been developed which are more sustainable and less harmful. PVDC disintegrates at a comparatively lower temperature which creates an issue in recycling. EU recently banned or restricted the use of PVDC in various regions. The latest G7 summit focused on reducing carbon footprint and sustainable practices,

even with the concerns PVDC markets shows growth driven by high barrier properties and the reduced waste in supply chain. The increase in flexible food packaging increases the demand of PVDC resins.

“Pharmaceutical & medical industry will emerge as the fastest-growing segment by 2026.”

Advancement in manufacturing techniques and continuous development in the barrier resins have resulted in increasing demand of barrier resins in the pharmaceutical industry. This growth is expected to be the highest in the emerging economies such as Brazil, India, and China, as it is supported by increase in wealth and growing consciousness about improved healthcare facilities and healthier lifestyles. The COVID-19 outbreak increased the demand of single use and packaged medical products which resulted in increased demand of barrier resins as well.

“APAC is the largest market in all end-use industries due to the presence of major developing economies and large population.”

APAC is the largest market for barrier resins, accounting for a share of 42.5%, in terms of value, in 2020. The growing packaging industry and the increasing demand in the agriculture sector are the factors driving the barrier resins market in the region.

Extensive primary interviews have been conducted, and information has been gathered from secondary research to determine and verify the market size of several segments and sub-segments.

Breakdown of Primary Interviews:

By Company Type: Tier 3 – 46%, Tier 2 – 36%, and Tier 1 – 18%

By Designation: Directors – 27%, C Level – 18%, and Others – 55%

By Region: APAC – 55%, North America – 18%, Europe – 9%, South America-9%, and the Middle East & Africa – 9%

The key players in the barrier resins market include LyondellBasell Industries (US), Kuraray Co Ltd. (Japan), Exxon Mobil Corporation (US), and The Dow Chemical Company (US)

Research Coverage:

The barrier resins market has been segmented based on type (flexibility and rigid), resin type (PVDC, EVOH, PEN, PA, PE, PP, PVA, and others), end-use industry (food & beverage, pharmaceutical & medical, cosmetics, agriculture, industrial, aerospace, medical, leather & footwear, and others), and region (APAC, Europe, North America, South America, and Middle East & Africa).

Reasons to Buy the Report

From an insight perspective, this research report focuses on various levels of analyses — industry analysis (industry trends), market share analysis of top players, and company profiles, which together comprise and discuss the basic views on the competitive landscape; emerging and high-growth segments of the market; high growth regions; and market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

Updated financial information/ product portfolio of players

Newer and improved representation of financial information: The new edition of the report provides updated financial information in the context of the barrier resins market till 2019/2020 for each listed company in graphical representation in a single diagram. This would help easily analyze the present status of profiled companies in terms of their financial strength, profitability, key revenue-generating region/country, business segment focus in terms of the highest revenue-generating segment, and investment on R&D activities.

Updated market developments of profiled players

Recent Market Developments: Recent developments are helpful to know the market trends and growth strategies adopted by players in the market. Current analysis shows that investment & expansion was a popular growth strategy followed by players during 2016-2021.

Coverage of new market players Ecosystem:

Company profiles give a glimpse of the key players in the market with respect to

business overview, financials, product offerings, and recent developments. In the new edition of the report, overall, 21 players have been profiled who are active in the barrier resins market. The key players adopted various strategies in the barrier resins market. These strategic developments have challenged the status quo of industry leaders, and it is prudent to analyze the changing business landscape.

Addition in historical and forecasting years:

In the previous edition of the report, we considered the period from 2014 to 2026. In the latest edition, the market sizing and forecasting are done for the period between 2019 and 2026.

Competitive Leadership Mapping:

By understanding the product portfolio and the strategies adopted, we have developed competitive leadership mapping, which segments total market players among four quadrants based on strength of product portfolio and business strategy excellence.

Case Studies/ Commercialization of Concept /New Use case:

The main objective of the study was to ascertain the impact of several macro as well as micro-economic factors on the current and future demand for barrier resins to help the stakeholders to prioritize strategic decisions.

Value Chain Analysis:

Provided analysis of the barrier resins market supply chain and qualitative insights. Included company analysis and depict their integration across the value chain.

COVID-19 Impact Analysis:

Included analysis of how the market will behave post-COVID-19. Provided qualitative insights regarding the COVID-19 impact on the supply chain, end-use industries, regions, market players, etc.

Patent Analysis:

This study defines patents claiming inventions linked to the “barrier resins.” The patents were categorized and analyzed using the keyword “barrier resins,” which

contains in the Patent “Title AND Abstract.” Since this chapter aims to provide an overview of patenting activity in the titled area, the source used for this analysis is Patentscope-Wipo, Espacenet, USPTO Patent Database, The Lens - Patent and Scholarly Search.

Ecosystem:

Provided strategic insights on each of the nodes present in the ecosystem of barrier resins market through knowledge store, highly interactive market intelligence platform.

Pricing Analysis:

Price analysis is done based on the average price for barrier resins sold in the global market. The global price is likely to vary in the future and is also dependent on raw material prices.

Market Share Analysis:

The market share is provided by considering the segment revenue pertaining to barrier resins of the respective companies.

Top 5 Company Revenue Analysis:

The top 5 company revenue analysis is provided by considering the overall revenue and profitability of the key players in the barrier resins.

SME Quadrant:

The SME Matrix analysis provides information about the emerging players that offer barrier resins and outlines the findings. This analysis provides information about the performance of barrier resins manufacturers in terms of product offerings and business strategies. The emerging companies are classified into four categories based on certain criteria. The categories are progressive, starting blocks, responsive, and dynamic.

Regulatory and Safety requirements:

This helps a client or player to know when it is trying to enter this market, or prospecting for a raw material supplier/vendor.

Trade Data:

This provides the import-export data for barrier resins in terms of value for various countries.

Adjacent Market Data:

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