

# **Metalized Flexible Packaging Market by Material Type (Aluminum Foil based, Metalized Film), Structure, Packaging Type (Pouches, Bags, Wraps), End-Use Industry (Food, Beverage, Personal Care, Pharmaceuticals), and Region - Global Forecast to 2028**

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## **Abstracts**

The metalized flexible packaging market is estimated to be USD 13.5 billion in 2023 and is projected to reach USD 16.8 billion by 2028, at a CAGR of 4.5% between 2023 to 2028. Metalized flexible packaging refers to a packaging material featuring a thin layer of metal, typically aluminum, applied to a flexible substrate like plastic or paper through a process known as metallization. This technique enhances the packaging's barrier properties, making it resistant to factors like moisture, oxygen, and light. The result is a versatile and visually appealing packaging solution that combines the flexibility of the substrate with the protective and reflective characteristics of the metal layer. Widely utilized across various industries, including food, pharmaceuticals, and consumer goods, metalized flexible packaging not only extends the shelf life of consumable products but also serves as an effective branding tool, due to its eye-catching and customizable features.

“Aluminum foil-based flexible packaging segment is the largest material type of metalized flexible packaging market.”

Flexible packaging based on aluminum foil offers outstanding barrier performance against water vapor and gases. It has excellent metal bond strength, a glossy appearance, strong lamination bond strength, and advantageous thermal properties. This type of packaging is extensively used for a range of products, including snacks,

frozen foods, sweets, pastries, frozen desserts, and coffee pouches. The utilization of stand-up pouches allows for the printing of vibrant and glossy graphics, enhancing the visual appeal for consumers. The demand for aluminum foil-based flexible packaging is expected to rise due to such factors. Aluminum, being the primary material in protective packaging, provides effective protection against moisture and chemicals. Its immunity to moisture, light, bacteria, and gases contributes to prolonging the shelf life of packaged food. This form of packaging is widely employed in various sectors, including pharmaceuticals for items like tablets, blister packs, foil blister packs, strip packs, ointments, creams, as well as caps and closures.

“Food sector is the fastest-growing End-Use Industry of Metalized flexible packaging market.”

The demand for flexible products like stick packs in the food sector has surged due to the busy lifestyles of the working population. The versatility of flexible packaging caters to diverse food needs, reducing leakage and extending product shelf-life. Metalized flexible packaging, particularly in the food industry, addresses the imperative of minimizing food loss and prolonging shelf-life. An ongoing challenge is the reduction of packaging waste without compromising food safety. The Food and Agriculture Organization (FAO) anticipates a 70% increase in global food production by 2050 to meet population demands, necessitating innovation in the food industry. The Flexible Packaging Association (FPA) notes that the food sector constitutes 60% of all flexible sales in North America, with a preference for flexibility in design to address specific packaging requirements. As the food industry continues to grow globally, the demand for metalized flexible packaging, tailored to snacks, frozen food, fruits, and dairy products, is expected to rise. Addressing environmental concerns and exploring sustainable alternatives remains crucial in this evolving landscape.

“Asia Pacific to be the Fastest-Growing Metalized Flexible Packaging Market during the forecast period. “

APAC is estimated to be the largest market for metalized flexible packaging market and is also projected to register the fastest CAGR of 6.0% during the forecast period. China is expected to account for the largest share of the market in APAC in 2022 with 42.0%. The Asia Pacific region, identified by the World Bank as the fastest-growing in both population and economic terms, has approximately 4.5 billion people, as reported by the International Renewable Energy Agency (IRENA) in 2022. The increasing population in this region establishes a substantial consumer base for food, beverages, FMCG products, and healthcare services, likely dominating the metalized flexible packaging

market. Notably, emerging economies like India and China are anticipated to drive significant demand for metalized flexible packaging, attributed to the growth in packaging, food and beverage, and pharmaceutical industries. The market size is poised for growth, driven by rapid economic development and government initiatives favoring sustainable packaging solutions. Initiatives like Japan's Plastic Smart campaign and Singapore's Zero Waste Masterplan aim to reduce plastic waste, stimulating demand for eco-friendly materials like metalized flexible packaging. This recyclable packaging option supports a sustainable and environment-friendly approach, aligning with the increasing awareness of renewable and recyclable packaging, driven by factors such as a growing middle-class population, industrialization, rising disposable income, high consumption of packaged products, and evolving lifestyles.

Extensive primary interviews were conducted to determine and verify the market size for several segments and sub segments and information gathered through secondary research.

The break-up of primary interviews is given below:

By Company Type – Sales/Export/Marketing– 54%, Production – 23%, and CXOs – 23%

By Designation – Managers – 61%, CXOs – 23%, and Executives – 16%

By Region - North America – 27%, Europe – 25%, Asia-Pacific– 33%, South America- 10%, Middle East and Africa- 5%

Note: Others include sales, marketing, and product managers.

Note: Tier 1: \$\$\$\$USD 5 Billion; Tier 2: USD 1 Billion– USD 5 Billion; and Tier 3: \$\$\$USD 1 Billion.

Amtcor plc (Australia), Mondi Plc (UK), Sonoco Products Company (US), Sealed Air Corporation (US), Huhtamaki Oyj (Finland), Transcontinental Inc. (Canada), Cosmo Films Ltd. (India), Polyplex Corporation Ltd. (India), Uflex Limited (India), Jindal Poly Films Ltd. (India), and other leading companies in this market.

Research Coverage:

This research report categorizes the metalized flexible packaging market on the basis of material type, structure, packaging type, end-use industry, and region. The report includes detailed information regarding the major factors influencing the growth of the metalized flexible packaging market such as drivers, restraints, challenges, and opportunities. A detailed analysis of the key industry players has been done to provide insights into business overviews, products & services, key strategies, expansions, new product developments, agreements and recent developments associated with the market.

### Key Benefits of Buying the Report

The report is expected to help the market leaders/new entrants in this market share the closest approximations of the revenue numbers of the overall metalized flexible packaging market and its segments and sub-segments. This report is projected to help stakeholders understand the competitive landscape of the market, gain insights to improve the position of their businesses and plan suitable go-to-market strategies. The report also aims to help stakeholders understand the pulse of the market and provides them with information on the key market drivers, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers, restraints, opportunities and challenges influencing the growth of the metalized flexible packaging market

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the metalized flexible packaging market

Market Development: Comprehensive information about lucrative markets – the report analyses the metalized flexible packaging market across varied regions

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the metalized flexible packaging market

Competitive Assessment: In-depth assessment of market shares, growth strategies and service offerings of leading players like Amcor plc (Australia), Mondi Plc (UK), Sonoco Products Company (US), Sealed Air Corporation (US), Huhtamaki Oyj (Finland), Transcontinental Inc. (Canada), Cosmo Films Ltd.

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\*Details on Business overview, Products/Solutions/Services offered, Recent Developments, MnM view, Key strengths, Strategic choices, Weaknesses and competitive threats might not be captured in case of unlisted companies.

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