Metallized Film Market by Material Type (PP and PET), Metal (Aluminum), End-use Industry (Packaging, Decorative), And Region (North America, Europe, Asia Pacific, Middle East & Africa, and South America) - Global Forecast to 2026

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Abstracts

The metallized film market is projected to grow from USD 2.4 billion in 2020 to USD 3.3 billion by 2026, at a CAGR of 5.3% between 2021 and 2026. Rising consumer demand for processed and packaged food items and shifting preference for aesthetically appealing products are fueling the demand for flexible packaging, which, in turn, is driving the market for metallized films. The use of metallized films has certain drawbacks regarding product inspection, especially in food packaging. Metal detectors struggle to meet the specifications required by retailers/consumers when inspecting products in metallized film-coated pouches. This drawback limits the use of metallized films in food packaging applications.

“PET to be the fastest end-use industry segment of metallized film market”

The market for the PET segment is projected to witness a CAGR of 4.7%, in terms of volume, during the forecast period. The market for this segment is driven by its low cost and wide usage in various applications. Polyethylene Terephthalate (PET) has excellent dimensional stability, high tensile strength, low moisture absorption, good chemical resistance, excellent electrical properties, and good barrier properties. This film can be metallized, which improves its gas barrier properties. PET is completely recyclable and is, hence, in high demand in various end-use industries. Metallized PET films are ideal for applications that require the preservation of flavor and freshness. These films are suitable for various applications in the packaging industry as well as in the industrial sector. The PET-based metallized films segment is expected to register the highest

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growth in the APAC region. This high growth is attributed to the high demand from packaging and electronics industries

“Rising demand from APAC is major driver for metallized film market”

APAC is estimated to account for the second-largest share of the metallized film market in 2018, in terms of both volume and value. The market in this region is also projected to register the highest CAGR between 2018 and 2023, in terms of value. The APAC metallized film market is growing due to the rapid expansion of end-use industries such as food & beverages, healthcare, and cosmetics & toiletries. Factors such as rising disposable income, changing lifestyles, and growing middle-class population are expected to drive the demand for packaging, which in turn, will support the growth of the metallized film market in the region.

“The metallized film market in the decorative industry accounted for the second largest share of 3.3%, in terms of volume, in 2020 to reach a market size of 42 kilotons by 2026.”

The global decorative industry witnessed a significant growth, owing to the expanded customer base and increasing application in innovative products. The growing e-commerce is one of the major factors which is expected to drive the demand for decorative packaging. This, in turn, is driving the demand for metallized films in the decorative industry.

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 subsegments.

Breakup of Primary Interviews:

- By Company Type: Tier 1 – 45%, Tier 2 – 30%, and Tier 3 – 25%
- By Designation: C Level – 34%, D Level – 26%, and Others – 40%
- By Region: APAC – 61%, Europe – 15%, North America – 11%, Middle East & Africa – 7%, and South America – 6%

Key companies profiled in this report include Cosmo Films Ltd. (India), Jindal Poly Films

Ltd. (India), Polinas (Turkey), and Toray Industries Inc. (Japan).

Research Coverage:

The metallized film market report has been segmented on the basis of material (PP, PET), metal (aluminum, others), end-use industry (packaging, decorative), and region (North America, Europe, Asia Pacific, South America, Middle East & Africa). The end-use industry segment is further analyzed for each country in the respective regions. The report also provides company profiles and competitive strategies adopted by key players in the metallized film market.

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, value-chain analysis, 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:

Market Penetration: Comprehensive information on metallized film offered by top players in the metallized film market

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the metallized film market

Market Development: Comprehensive information about lucrative emerging markets – the report analyzes the market for metallized film across regions

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the metallized film market

Competitive Assessment: In-depth assessment of market shares, strategies, products, and manufacturing capabilities of leading players in the metallized film market

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About

The report "Metallized Film Market by Material Type (PP and PET), Metal (Aluminum), End-use Industry (Packaging, Decorative), and Region (North America, Europe, Asia Pacific, Middle East & Africa, and South America) - Global Forecast to 2023", The metallized film market is projected to grow from USD 2.20 billion in 2018 to USD 2.82 billion by 2023, at a CAGR of 5.09% from 2018 to 2023. The market is driven by the extensive use of metallized film in end-use industries such as packaging and decorative. The major factor driving the metallized film market is the high demand for lightweight, consumer-friendly, and easy to handle products. Growing focus on sustainability, increased need for extended shelf life, rising standards of hygiene, and consumer focus on ease of use are the key drivers for the metallized film market, globally.

Major companies profiled in this report include:

Cosmo Films Ltd. (India), Jindal Poly Films Ltd. (India), Polinas (Turkey), and Toray Industries Inc. (Japan). among others. Diverse product portfolios, strategically positioned R&D centers, continuous adoption of developmental strategies, and technological advancements are the factors strengthening the market position of these companies. These companies have adopted various organic and inorganic growth strategies to enhance their current market share in the metallized film market.

Breakup of Primary Interviews:

- By Company Type: Tier 1 – 45%, Tier 2 – 30%, and Tier 3 – 25%

- By Designation: C Level – 34%, D Level – 26%, and Others – 40%

- By Region: APAC – 61%, Europe – 15%, North America – 11%, Middle East & Africa – 7%, and South America – 6%

The metallized film market report has been segmented on the basis of material (PP, PET), metal (aluminum, others), end-use industry (packaging, decorative), and region (North America, Europe, Asia Pacific, South America, Middle East & Africa). The end-use industry segment is further analyzed for each country in the respective regions. The report also provides company profiles and competitive strategies adopted by key players in the metallized film market.

Cosmo Films (India), Jindal Poly Films (India), Uflex (India), and Toray Industries (Japan) are the most prominent players in the metallized film market. These companies have mainly adopted new product launch and expansion strategies in the past three years to achieve growth in the metallized film market.

Cosmo Films is one of the key manufacturers of biaxially oriented polypropylene (BOPP) films at the global level. The company operates under two business segments, namely, packaging films and others. It offers several products such as packaging films, label films, lamination films, and industrial films. The company has its manufacturing operations in India, South Korea, and the US along with sales offices in the US, Asia Pacific, and Europe. It sells its products across the globe with a widespread network of channel partners and exports to over 80 countries, globally. The company has metallized films products under barrier packaging films. In February 2017, Cosmo Films introduced highly effective high barrier metallized BOPP film. This film can be used for all food and personal care applications where moisture barrier is of maximum importance.

Jindal Poly Films is an Indian company engaged in the manufacturing BOPP and biaxially-oriented polyethylene terephthalate (BOPET) films, mainly for the flexible packaging industry. The company operates through three reportable segments, namely, packaging films, photographic products, and nonwoven fabrics. Under the packaging films segment, the company manufactures flexible packaging films, which include plastic films, paper, and aluminum foil. Metallized BOPET and BOPP films are also used for flexible packaging application. The company manufactures products at its 6 manufacturing units—two located in the US, three in Europe (in Italy, Belgium, and the Netherlands), and one in India. In February 2017, Jindal Poly Films planned to increase the production capacity of BOPP films used in flexible packaging. It will add 10,000 tons of metallization capacity. The capacity expansion comprises metallizing & extrusion at its Brindisi (Italy) site.

Packaging: Largest end-use industry of metallized film market

Metallized film is used in various end-use industries, such as packaging and decorative. Increasing demand for flexible packaging offers opportunities for the metallized film market in the food & beverage packaging industry. Owing to busy and hectic lifestyles, consumers opt for convenient mealtime solutions. This puts ready-to-eat meals in flexible packaging formats in a good position to take advantage of the current social and economic trend. Flexible packaging is the most cost-effective method to package, preserve, and distribute food, beverages, pharmaceuticals, and other products that need extended shelf life. These factors are expected to drive the demand for metallized film in the packaging industry.

Polypropylene (PP) Metallized Film: Largest segment of metallized film market, by material type

Metallized films produced from PP are used to pack cheese, bakery products, snack foods, and candies, among others. Metallized film made from this material is a good moisture barrier but poor oxygen barrier. This film is metallized to improve its barrier properties and to increase the shelf life of packed products. Owing to its resistance to chemicals and low odor, this film is suitable for use in applications regulated under the FDA regulations. The use of PP metallized film in packaging application for products which requires a long shelf life, such as food, bakery products, snacks, and candies, is driving the growth of this market. These factors are driving the PP metallized film market.

Aluminum Metallized Film: Largest segment of metallized film market, by metal type

Aluminum is the most commonly used metal in metallized film manufacturing, primarily due to its cost-effectiveness. Aluminum is a lightweight, silvery-white metal derived from bauxite ore, where it exists in combination with oxygen as alumina. Aluminum is highly resistant to most forms of corrosion and its natural coating of aluminum oxide provides a highly effective barrier against air, temperature, moisture, and chemical attacks. Aluminum metallized film offers excellent barrier performance against water vapor & gases, good metal bond strength, glossy appearance, good lamination bond strength, and good thermal & mechanical properties. Aluminum metallized film is used in packaging for snacks, frozen food, sweets and pastries, frozen desserts, coffee, etc. These factors are driving the aluminum metallized film market.

High demand from Europe: Major driver for metallized film market

Europe is expected to be the largest metallized film market in 2018. The major factors behind Europe’s high market share are the high demand for lightweight, consumer-friendly, and easy to handle products. Pouches have become an important form of packaging across Europe owing to their ease of use and functionality. Stand-up pouches allow printing of high-quality, glossy graphics on the package, which makes them attractive and appealing to customers. The growing focus on sustainability, increased need for extended shelf life, rising standards of hygiene, and consumer focus on ease of use are the key drivers for the metallized film market in the region.

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