

Global Aseptic Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Global Aseptic Packaging Market size is estimated at USD 70.65 billion in 2024, and is expected to reach USD 116.23 billion by 2029, growing at a CAGR of 10.47% during the forecast period (2024-2029).

Key Highlights

Aseptic packaging involves packaging a product at ultra-high temperature (UHT), sterilizing or sanitizing the packaging separately, and fusing and sealing under sterile atmospheric conditions to avoid viral and bacterial contamination. In addition, it maintains the quality of the package contents and does not require preservatives.

Sustainable packaging and longer shelf life are essential to consumers in the food and beverage industry. As a result, most food and beverage vendors are inclining toward aseptic packaging due to its cost and environmental benefits. Also, as aseptic packaging supports packaging through recyclable cartons and eco-friendly pouches and bags, which often target consumers that prefer small-quantity packaging and make purchases more frequently, the demand for such products is considerably high worldwide.

Changing consumer eating habits is increasing the preference for ready-to-eat meals and demand for convenient, high-quality food products, opening more doors for market growth. A gradual increase in global e-commerce sales and growth opportunities in emerging markets is anticipated to present significant opportunities for the sterile packaging market during the forecast period.

The pharmaceutical industry utilizes aseptic pouches for packaging liquid medications, IV drugs, and other sterile products. Factors driving the growth of the aseptic packaging market include a rising need for biologics and vaccines. The demand is primarily due to the requirement for maintaining sterility and extending shelf life.

The surge in mergers and acquisitions within the aseptic packaging market signals the strategies of market players to consolidate and capitalize on evolving consumer demands for safe and convenient packaging solutions. For instance, in October 2023, Shandong NewJF Technology Packaging Co. Ltd (NEWJF), a Chinese aseptic packaging enterprise, completed the acquisition of a 28.22% stake in Greatview Aseptic Packaging. This was intended to elevate NEWJF's position in liquid product packaging by enhancing market presence, streamlining operations, and fostering innovations in the rapidly growing market.

Aseptic Packaging Market Trends

The Growing Demand for Beverages is Expected to Drive the Market

The rising consumption of on-the-go beverages and the increasing number of outlets are expected to boost the market's growth in the beverage industry. The change in consumer needs provides packaging producers with several options for meeting innovative packaging needs in the beverage industry.

Consumers frequently grab convenient and functional drinks, such as RTD coffee and tea, energy drinks, and other beverages that can be consumed whenever and wherever they need a boost. Non-alcoholic drinks that offer functional and practical benefits that are relatively healthy and natural can appeal to busy consumers. Leveraging the natural, energy-boosting characteristics of electrolytes, vitamins, minerals, and other natural ingredients in new product formulations can help brands target a specific consumer base.

The increasing demand for nutraceutical beverages and products due to several healthy ingredients, such as vegetables and fruits, and the rising global demand for milk-based drinks are expected to boost global functional growth. This is expected to be a significant growth driver for the beverage market during the forecast period.

The increasing demand for instant energy drinks that provide mental and physical stimulation among fitness enthusiasts is projected to create significant growth opportunities for the functional beverage market during the forecast period.

Consumers in the market are becoming increasingly conscious of health and wellness. From juice in the morning to energy drinks, they are spending more on products that provide refreshments and are well within the wellness trend. This trend has created a high demand for cost-effective packaging solutions in the beverage packaging segment. The increasing demand for aseptic cartons from the milk and other dairy beverages sectors may trigger additional activity in the market due to the ability of cartons to offer benefits like easy stacking of products and longer shelf life.

As per data from Statistisches Bundesamt; BMEL, Germany's high per capita milk consumption in 2023 at 44.38 kg indicated a strong demand for dairy products, driving the adoption of aseptic packaging solutions to maintain product freshness and extend shelf life, which aligned with consumer preferences for convenience and food safety.

Asia-Pacific to Witness the Fastest Growth

China is one of the major consumers of aseptic packaging in Asia-Pacific. The growing food and beverage sector is anticipated to support the market's growth during the forecast period. The growing trend of packed meals, the increasing number of restaurants and supermarkets, and the increasing consumption of bottled water and beverages are significant factors driving the market in the country.

In October 2023, Chinese food company Hainan Chunguang Foodstuff Co. selected Sidel's Aseptic Combi Predis line to expand into the beverage market by producing coconut milk. Utilizing Sidel's PET design for 350 ml bottles, the latest facility produces 28,000 bottles per hour. This installation supplements the existing more than 100 aseptic line setups across China. The adoption of Sidel's technology by Hainan Chunguang contributed to the growth of the aseptic packaging market.

Consumers increasingly use aseptic pouches in Japan, particularly for sauces and curries. Aseptic pouches can replace conventional cans since they are made from laminated plastic and aluminum, which can withstand the thermal processing used for sterilizing. Pouch packaging is more affordable than cans, especially in nations that import metal for canning, which is the key driver promoting acceptance in Japan. The rising consumption of soft drinks is also leading to the expansion of aseptic production lines among beverage manufacturers. For instance, in February 2023, Coca-Cola Japan built an aseptic production line for its coffee products at its Ebina plant.

Australia is one of the Asia-Pacific region's fastest-growing packaging markets. The meat, fresh produce, and processed food industries are growing nationwide. Rising consumer ethical concerns and trends in health and well-being have sustained the demand for locally produced, fresh food. In addition, the use of single-serve and reusable packaging options such as pouches has increased along with the country's tendency to snack over the years. The demand for RTD pouches is also fueled by the steadily rising demand for dairy products and fresh fruit juices.

India's market is driven by a growing population, increased income, and changing lifestyles. Growth prospects of end-user segments are leading to a rise in the demand for the rigid plastic packaging industry. In addition, the market's expansion products are being constrained by the increasing use of alternative packaging options for pouch packaging. Due to the rapidly growing demand for packaged food goods and increased disposable income, India is expected to hold a significant share of the Asia-Pacific aseptic packing market.

As per the USDA Foreign Agricultural Service, in 2023, the consumption in India was 207.5 million metric tons, indicating a steady annual growth of 2.5%. India's substantial milk consumption rates prompt a surge in aseptic packaging adoption, catering to the growing demand for convenient, longer-lasting dairy products while addressing logistical challenges in distribution and storage, fostering market growth and innovation within India's aseptic packaging market.

Aseptic Packaging Industry Overview

The aseptic packaging market is highly competitive and consists of several major players. With a prominent share in the market, these major players are focusing on expanding their customer bases across foreign countries. These companies leverage strategic collaborative initiatives to increase their market shares and strengthen their product capabilities through acquisitions, product launches, etc. Some of the major players in the market are Amcor Ltd, IPI SRL (Coesia Group), Tetra Pak International SA, Sealed Air Corporation, SIG Combibloc Group, and Schott AG.

September 2023: SIG started the construction of its first aseptic carton facility in India. The plant is expected to be fully operational by 2025, and once constructed, the facility is set to support the production of up to four billion aseptic carton packs every year.

With additional investments in the future, the capacity could be expanded to ten billion packs annually.

September 2023: SIG and AnaBio Technologies joined forces to release a long-life probiotic yogurt worldwide. This collaboration introduced a novel product category, including probiotic beverages packaged in aseptic carton packs and sprouted pouches, designed to remain shelf-stable for extended storage periods without refrigeration.

Additional Benefits:

The market estimate (ME) sheet in Excel format

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Contents

1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET INSIGHTS

- 4.1 Market Overview
- 4.2 Industry Value Chain Analysis
- 4.3 Industry Attractiveness - Porter's Five Forces Analysis
 - 4.3.1 Bargaining Power of Suppliers
 - 4.3.2 Bargaining Power of Buyers
 - 4.3.3 Threat of New Entrants
 - 4.3.4 Threat of Substitute Products and Services
 - 4.3.5 Intensity of Competitive Rivalry
- 4.4 Aseptic Packaging for Beverages - Demand Insights

5 MARKET DYNAMICS

- 5.1 Market Drivers
 - 5.1.1 Growing Demand for Beverages
 - 5.1.2 Commodity Value of Glass Increased With Recyclability
- 5.2 Market Challenges
 - 5.2.1 Volatility in the Raw Material Prices

6 MARKET SEGMENTATION

- 6.1 By Product
 - 6.1.1 Cartons
 - 6.1.2 Bags and Pouches
 - 6.1.3 Cans
 - 6.1.4 Bottles
- 6.2 By Application

6.2.1 Beverage

6.2.1.1 Ready-to-drink Beverages

6.2.1.2 Dairy-based Beverages

6.2.2 Food

6.2.2.1 Processed Food

6.2.2.2 Fruits and Vegetables

6.2.2.3 Dairy Food

6.2.3 Pharmaceuticals

6.3 By Geography***

6.3.1 North America

6.3.1.1 United States

6.3.1.2 Canada

6.3.2 Europe

6.3.2.1 Germany

6.3.2.2 United Kingdom

6.3.2.3 France

6.3.2.4 Italy

6.3.3 Asia

6.3.3.1 China

6.3.3.2 India

6.3.3.3 Japan

6.3.3.4 Australia and New Zealand

6.3.4 Latin America

6.3.4.1 Brazil

6.3.4.2 Argentina

6.3.5 Middle East and Africa

6.3.5.1 United Arab Emirates

6.3.5.2 Saudi Arabia

6.3.5.3 South Africa

7 COMPETITIVE LANDSCAPE

7.1 Company Profiles

7.1.1 Amcor Ltd

7.1.2 IPI SRL (Coesia Group)

7.1.3 Tetra Pak International SA

7.1.4 SIG Combibloc Group

7.1.5 DS Smith PLC

7.1.6 Uflex Limited

7.1.7 Elopak AS

7.1.8 BIBP SP ZOO

7.1.9 CDF Corporation

7.1.10 Smurfit Kappa

7.1.11 Mondi PLC

8 FUTURE OF THE MARKET

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