

Stand-Up Pouches - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Stand-Up Pouches Market size is estimated at USD 13.73 billion in 2024, and is expected to reach USD 18.04 billion by 2029, growing at a CAGR of 5.62% during the forecast period (2024-2029).

The stand-up pouch is a flexible packaging solution with a wide bottom gusset that allows the pouch to stand prominently without collapsing. The pouch comprises multiple layers of barrier material, which are laminated to create one continuous sheet. The layers protect and preserve the contents from any external element, thus propelling the demand for stand-up pouches.

Key Highlights

Stand-up pouches are lightweight, which reduces packaging and transportation, making them a cost-effective solution for manufacturers. The growing demand for stand-up pouches for food and beverage packaging to optimize brand marketing initiatives is driving the market growth globally. Furthermore, the increasing usage of stand-up pouches for pet products due to their flexibility, durability, and ability to keep the contents fresh is expected to boost the market growth during the forecast period.

The rise in the demand for on-the-go snacks has led to the need for re-closable stand-up pouches, which offer convenience to consumers. The growing use of stand-up pouches to keep food items fresh and secure from moisture helps to extend the shelf life, thus boosting the market growth. In addition, the changing lifestyle and food preferences among consumers, coupled with changing food technology, further create demand in the market.

Innovation in packaging is bringing lucrative opportunities for the personal care packaging industry. The convenient and easy-to-use dispensing and transportability of Amcor's recyclable stand-up pouches make them an excellent choice for liquids, creams, and gels. In addition, Amcor and L'Oreal recently partnered to create a refill ecopack shampoo made of recyclable polyethylene (PE) monosodium bicarbonate film. Since the partnership, L'Oreal has switched to the recyclable stand-up pouch, which reduces plastic consumption by 75%.

However, increasing consumer awareness of environmental concerns, dynamic regulatory standards, the ongoing drive for sustainability, and the poor recycling rate due to the need for advanced recycling facilities are challenging market growth.

The growing concern over sustainability further pushes the vendors towards recyclable and sustainable stand-up pouches. The market is likely to witness capital investment in sustainable product innovation and the growth of new recycling industries. For instance, in November 2023, ProAmpac LLC, a flexible packaging company, launched its ProActive PCR retort pouches as a sustainable alternative to conventional pouches. The ProActive PCR pouches contain 30% post-consumer recycled (PCR) material designed to help brands achieve sustainability goals.

Stand-Up Pouches Market Trends

Rising Adoption of Flexible Packaging Solutions for Packaged Food and Beverage

The rapidly expanding food and beverage sector in North America, Europe, and Asia-Pacific is attributable to the growing population, changing consumer lifestyle, and growing spending capacity. Lifestyle changes and easy access to information on health and nutrition are increasing the demand for indulgent yet healthy foods, convenience foods, and single-serve options. These rapid changes in the food and beverage landscape create demand for convenient packaging options like stand-up pouches.

According to the Organic Trade Association, the consumption of organic packaged food and beverages in the United States is projected to reach USD 27.86 billion in 2025 from USD 24.78 billion in 2022. This is expected to fuel the demand for cost-effective, flexible packaging solutions, including stand-up pouches.

Stand-pouch packaging enhances business brand identity and strengthens visual marketing. Pouches are versatile, flexible, and attractive, promoting the brand and increasing sales. Digitally printed stand-up pouches can enhance a brand's identity in

any way the business wants. The company can utilize the whole surface of the pouch to display exciting graphics, logos, branding messages, or product details.

Additionally, consumers now consider stand-up pouches a signifier of quality, making it necessary for vendors to communicate premiumization through such a form of packaging. Stand-up pouches offer superior protection for foods, keeping them safe from moisture, light, air, and bacteria.

The ongoing expansion of the market can be attributed to factors such as the increasing demand for packaged food and beverages driven by convenience and affordability. Stand-up pouches are usually made with lightweight materials, significantly lowering transportation costs. The demand is also fueled by the fact that pouches come with various closure options, including a spout, zipper, and tear notch, further boosting the market's growth.

Several industry manufacturers focus on introducing sustainable solutions and have constantly been working on customer and market needs. For instance, in January 2024, API Group, a US-based packaging company, along with its subsidiary Accredo Packaging, collaborated with the Fresh-Lock team to introduce a flexible stand-up pouch made with 50% post-consumer recycled (PCR) material for food packaging. The product is available with child-guard slider technology that results in child-safe closure protection and promotes a circular economy.

Asia-Pacific is Expected to be the Fastest-growing Market for Stand-up Pouches

Stand-up pouches are gaining popularity in the region's growing food processing industry. In light of increasingly busy lifestyles, consumers are favoring lightweight, portable snack packaging to accommodate their on-the-go needs. Compact sizes with resealable features such as zippers are currently very popular, meeting the demand for convenient on-the-go options. The market is driven by the growing preference for mostly on-the-go food products and retort-packed goods to maintain shelf stability.

The expansion of organized food retail outlets plays a pivotal role, offering consumers diverse products with enticing discounts. The food processing industry in India is undergoing a transformative phase, embracing technological and social advancements. Thus, the demand for convenient and ready-to-consume products underscores the significance of efficient and innovative packaging solutions like pouches.

Urban areas, particularly, witness a surge in the popularity of processed foods like ready-to-eat products and snacks. According to the India Brand Equity Foundation, the annual household consumption of processed foods in India is expected to triple by 2030, establishing the country as a lucrative market.

In April 2023, SIG announced the opening of a second production plant in Palghar, India. The plant produces SIG's bag-in-box and spouted pouch packaging, previously marketed under Scholle IPN and Bossar.

Furthermore, the pet care industry in Asia has registered positive growth owing to increasing pet ownership, which is driven by demographic changes and the rising income levels of the population. Health for Animals, a government organization, has estimated that China will have the most pets in the world by the end of 2024, which is expected to drive the demand for stand-up pouches in the country.

Additionally, the Thai pet food export market's growth presents a significant opportunity for the pouch packaging industry, as pet humanization drives demand for premium packaging solutions. With a focus on convenience and freshness, pouch packaging plays a pivotal role in meeting the evolving needs of domestic and export markets within the pet food industry.

Stand-Up Pouches Industry Overview

The market is fragmented, with many global players operating in the market, constituting considerable market share. The leading market players are constantly upgrading their product portfolios and adopting various organic and inorganic strategies, such as new product launches, collaborations, and acquisitions, to dominate the market.

February 2024: Amcor Group GmbH partnered with Stonyfield Organic, a US-based company, to introduce the first-ever all-polypropylene (PP) spouted pouch. The pouch has an eco-friendly design for Stonyfield's YoBaby refrigerated yogurt product.

August 2023: Mondi PLC announced its collaboration with Fressnapf, a European pet food supplier, to provide a new range of mono-material recyclable packaging solutions for the dry pet food range. The mono-material packaging is recyclable and is designed in stand-up pouches.

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