

Biodegradable Barrier Packaging Films Market Forecasts to 2034 – Global Analysis By Film Material (Polylactic Acid Films, Polyhydroxyalkanoate Films, Starch-Based Films, Cellulose-Based Films and Chitosan-Based Films), Barrier Property, Film Structure, Packaging Format, End User and By Geography

<https://marketpublishers.com/r/BB32B2EDE8E1EN.html>

Date: August 2026

Pages: 200

Price: US\$ 4,150.00 (Single User License)

ID: BB32B2EDE8E1EN

Abstracts

According to Statistics MRC, the Global Biodegradable Barrier Packaging Films Market is accounted for \$1.5 billion in 2026 and is expected to reach \$2.6 billion by 2034 growing at a CAGR of 7.1% during the forecast period. Biodegradable barrier packaging films refer to thin, flexible material layers engineered to prevent the permeation of gases, moisture, and aromas while possessing the inherent capacity to decompose through biological processes into natural compounds. These films are manufactured from renewable biopolymers such as polylactic acid, polyhydroxyalkanoates, and cellulose derivatives that provide protective barrier properties comparable to conventional petroleum-based films. The technology incorporates advanced coating and multilayer extrusion techniques to achieve specific oxygen and moisture transmission rates required for preserving perishable contents. These films maintain structural integrity throughout the product shelf life before breaking down into carbon dioxide, water, and biomass under composting conditions.

Market Dynamics:

Driver:

Regulatory Plastic Bans

The accelerating implementation of single-use plastic restrictions and extended producer responsibility legislation across European Union member states and North American jurisdictions is compelling food and consumer goods manufacturers to transition toward biodegradable barrier alternatives. Regulatory frameworks mandating recyclability and compostability by 2030 are eliminating conventional multilayer plastic films from numerous packaging applications. Brand owners are proactively reformulating packaging portfolios to preempt compliance deadlines and avoid penalty structures tied to non-recyclable materials. This regulatory momentum is generating sustained demand for biodegradable films that deliver functional barrier performance without compromising end-of-life environmental outcomes.

Restraint:

Performance Limitations

The inherent moisture sensitivity and thermal stability constraints of current biodegradable polymers frequently limit their applicability in high-barrier applications requiring extended shelf life under variable humidity conditions. Polylactic acid and starch-based films often exhibit inferior oxygen barrier properties compared to conventional ethylene vinyl alcohol and polyvinylidene chloride structures without supplementary coating technologies. The narrow processing windows of biopolymers create manufacturing challenges that reduce production yields and increase unit costs relative to petroleum-based alternatives. These performance gaps restrict biodegradable barrier films to applications with moderate barrier requirements and shorter distribution cycles.

Opportunity:

Coating Technology Advances

Emerging nanocellulose and bio-based coating technologies are creating transformative opportunities to enhance the barrier performance of biodegradable films without compromising their compostability certifications. Researchers and manufacturers are developing ultra-thin bio-derived barrier layers that can be applied through conventional coating equipment while maintaining compatibility with industrial composting infrastructure. These innovations enable biodegradable films to compete with metallized and fluorocarbon-treated conventional films in demanding applications such as snack foods and pharmaceutical blister packaging. The successful commercialization of these

coating systems is expected to significantly expand the addressable market for biodegradable barrier solutions.

Threat:

Recycling Infrastructure Confusion

The coexistence of industrial compostable, home compostable, and biodegradable film certifications within the marketplace is generating substantial confusion among consumers and waste management operators. Inadequate industrial composting facility availability in many regions means that biodegradable films frequently enter conventional recycling streams where they contaminate polyethylene and polypropylene recycling batches. This contamination risk has prompted some municipalities to restrict compostable packaging acceptance, undermining consumer confidence and regulatory support. The lack of standardized labeling and inconsistent regional composting capabilities threaten to erode consumer trust and regulatory support for biodegradable barrier packaging adoption.

Covid-19 Impact:

The pandemic initially disrupted biodegradable film supply chains as agricultural feedstock sourcing faced logistics constraints and bio-refinery operations experienced workforce reductions. During the mid-pandemic period, heightened consumer awareness of hygiene and environmental sustainability simultaneously increased interest in packaging that reduced plastic pollution without compromising protective functions. Post-pandemic recovery has accelerated investment in domestic biopolymer production capacity as supply chain resilience concerns prompted regionalization of raw material sourcing strategies.

The polylactic acid films segment is expected to be the largest during the forecast period

The polylactic acid films segment is expected to account for the largest market share during the forecast period, due to the mature commercial availability of polylactic acid resins and established processing infrastructure across extrusion and thermoforming operations. Polylactic acid delivers favorable clarity and stiffness properties that make it suitable for a broad range of food packaging applications requiring moderate barrier performance. Major resin producers have significantly expanded production capacity in response to sustained demand from brand owners seeking petroleum-free alternatives.

The material's compatibility with existing converting equipment minimizes capital investment requirements for manufacturers transitioning from conventional plastics.

The oxygen barrier segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the oxygen barrier segment is predicted to witness the highest growth rate, driven by escalating demand for extended shelf-life preservation in packaged foods and pharmaceutical products susceptible to oxidative degradation. The development of bio-based oxygen scavenging additives and high-barrier coatings specifically designed for compostable substrates is enabling new application areas previously dominated by aluminum-laminated structures. Fresh meat, dairy, and ready-to-eat categories are increasingly specifying oxygen barrier biodegradable films to meet both sustainability commitments and food safety requirements. Continuous innovation in bio-derived barrier chemistries is accelerating commercial adoption across premium packaging segments.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, due to robust demand from food processing companies and consumer goods manufacturers seeking compliance with state-level plastic reduction mandates. The United States maintains substantial biopolymer research infrastructure and early-stage commercial production facilities that support domestic supply chain development. Major retailers and private label brands are establishing procurement policies that prioritize biodegradable packaging formats for private label product lines. The region's advanced composting infrastructure in key metropolitan markets provides viable end-of-life pathways that strengthen the business case for biodegradable barrier film adoption.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, due to rapid urbanization and expanding packaged food consumption across China, India, and Southeast Asian markets that are simultaneously implementing plastic waste reduction policies. Government investments in bio-refinery capacity and agricultural waste valorization programs are reducing feedstock costs for domestic biodegradable film production. The region's substantial flexible packaging manufacturing base is actively retooling to accommodate biopolymer processing requirements. Rising environmental awareness among middle-class consumers is

creating brand differentiation incentives that accelerate biodegradable barrier film penetration in retail channels.

Key players in the market

Some of the key players in Biodegradable Barrier Packaging Films Market include Amcor plc, Mondi plc, Sealed Air Corporation, Berry Global Group, Inc., Celanese Corporation, Eastman Chemical Company, International Paper Company, Stora Enso Oyj, UFlex Limited, Jindal Poly Films Limited, Taghleef Industries S.p.A., Coveris Management GmbH, Constantia Flexibles Group GmbH, Toray Industries, Inc., Kuraray Co., Ltd., Mitsubishi Chemical Group Corporation and Arkema S.A..

Key Developments:

In August 2026, Amcor plc launched a high-barrier biodegradable film for snack food applications utilizing advanced polylactic acid formulations with proprietary coating technology achieving oxygen transmission rates comparable to conventional metallized films.

In July 2026, Mondi plc introduced a home-compostable barrier film for frozen food packaging that maintains moisture and oxygen protection through temperature fluctuations while achieving certification under home composting standards.

In June 2026, Sealed Air Corporation unveiled a multilayer biodegradable barrier film system for pharmaceutical blister applications that eliminates polyvinyl chloride while maintaining child-resistant and senior-friendly opening features.

Film Materials Covered:

Polylactic Acid Films

Polyhydroxyalkanoate Films

Starch-Based Films

Cellulose-Based Films

Chitosan-Based Films

Barrier Properties Covered:

Oxygen Barrier

Moisture Barrier

Aroma Barrier

Grease Barrier

Light Barrier

Film Structures Covered:

Monolayer Films

Coated Films

Laminated Films

Multilayer Films

Extruded Films

Packaging Formats Covered:

Pouches

Wraps

Lidding Films

Sachets

Overwrap Films

End Users Covered:

Food Processing Companies

Beverage Companies

Pharmaceutical Manufacturers

Personal Care Companies

Household Product Manufacturers

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

Market share assessments for the regional and country-level segments

Strategic recommendations for the new entrants

Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030,

2032 and 2034

Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

Strategic recommendations in key business segments based on the market estimations

Competitive landscaping mapping the key common trends

Company profiling with detailed strategies, financials, and recent developments

Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

Contents

1 EXECUTIVE SUMMARY

- 1.1 Market Snapshot and Key Highlights
- 1.2 Growth Drivers, Challenges, and Opportunities
- 1.3 Competitive Landscape Overview
- 1.4 Strategic Insights and Recommendations

2 RESEARCH FRAMEWORK

- 2.1 Study Objectives and Scope
- 2.2 Stakeholder Analysis
- 2.3 Research Assumptions and Limitations
- 2.4 Research Methodology
 - 2.4.1 Data Collection (Primary and Secondary)
 - 2.4.2 Data Modeling and Estimation Techniques
 - 2.4.3 Data Validation and Triangulation
 - 2.4.4 Analytical and Forecasting Approach

3 MARKET DYNAMICS AND TREND ANALYSIS

- 3.1 Market Definition and Structure
- 3.2 Key Market Drivers
- 3.3 Market Restraints and Challenges
- 3.4 Growth Opportunities and Investment Hotspots
- 3.5 Industry Threats and Risk Assessment
- 3.6 Technology and Innovation Landscape
- 3.7 Emerging and High-Growth Markets
- 3.8 Regulatory and Policy Environment
- 3.9 Impact of COVID-19 and Recovery Outlook

4 COMPETITIVE AND STRATEGIC ASSESSMENT

- 4.1 Porter's Five Forces Analysis
 - 4.1.1 Supplier Bargaining Power
 - 4.1.2 Buyer Bargaining Power
 - 4.1.3 Threat of Substitutes
 - 4.1.4 Threat of New Entrants

- 4.1.5 Competitive Rivalry
- 4.2 Market Share Analysis of Key Players
- 4.3 Product Benchmarking and Performance Comparison

5 GLOBAL BIODEGRADABLE BARRIER PACKAGING FILMS MARKET, BY FILM MATERIAL

- 5.1 Polylactic Acid Films
- 5.2 Polyhydroxyalkanoate Films
- 5.3 Starch-Based Films
- 5.4 Cellulose-Based Films
- 5.5 Chitosan-Based Films

6 GLOBAL BIODEGRADABLE BARRIER PACKAGING FILMS MARKET, BY BARRIER PROPERTY

- 6.1 Oxygen Barrier
- 6.2 Moisture Barrier
- 6.3 Aroma Barrier
- 6.4 Grease Barrier
- 6.5 Light Barrier

7 GLOBAL BIODEGRADABLE BARRIER PACKAGING FILMS MARKET, BY FILM STRUCTURE

- 7.1 Monolayer Films
- 7.2 Coated Films
- 7.3 Laminated Films
- 7.4 Multilayer Films
- 7.5 Extruded Films

8 GLOBAL BIODEGRADABLE BARRIER PACKAGING FILMS MARKET, BY PACKAGING FORMAT

- 8.1 Pouches
- 8.2 Wraps
- 8.3 Lidding Films
- 8.4 Sachets
- 8.5 Overwrap Films

9 GLOBAL BIODEGRADABLE BARRIER PACKAGING FILMS MARKET, BY END USER

- 9.1 Food Processing Companies
- 9.2 Beverage Companies
- 9.3 Pharmaceutical Manufacturers
- 9.4 Personal Care Companies
- 9.5 Household Product Manufacturers

10 GLOBAL BIODEGRADABLE BARRIER PACKAGING FILMS MARKET, BY GEOGRAPHY

- 10.1 North America
 - 10.1.1 United States
 - 10.1.2 Canada
 - 10.1.3 Mexico
- 10.2 Europe
 - 10.2.1 United Kingdom
 - 10.2.2 Germany
 - 10.2.3 France
 - 10.2.4 Italy
 - 10.2.5 Spain
 - 10.2.6 Netherlands
 - 10.2.7 Belgium
 - 10.2.8 Sweden
 - 10.2.9 Switzerland
 - 10.2.10 Poland
 - 10.2.11 Rest of Europe
- 10.3 Asia Pacific
 - 10.3.1 China
 - 10.3.2 Japan
 - 10.3.3 India
 - 10.3.4 South Korea
 - 10.3.5 Australia
 - 10.3.6 Indonesia
 - 10.3.7 Thailand
 - 10.3.8 Malaysia
 - 10.3.9 Singapore

- 10.3.10 Vietnam
- 10.3.11 Rest of Asia Pacific
- 10.4 South America
 - 10.4.1 Brazil
 - 10.4.2 Argentina
 - 10.4.3 Colombia
 - 10.4.4 Chile
 - 10.4.5 Peru
 - 10.4.6 Rest of South America
- 10.5 Rest of the World (RoW)
 - 10.5.1 Middle East
 - 10.5.1.1 Saudi Arabia
 - 10.5.1.2 United Arab Emirates
 - 10.5.1.3 Qatar
 - 10.5.1.4 Israel
 - 10.5.1.5 Rest of Middle East
 - 10.5.2 Africa
 - 10.5.2.1 South Africa
 - 10.5.2.2 Egypt
 - 10.5.2.3 Morocco
 - 10.5.2.4 Rest of Africa

11 STRATEGIC MARKET INTELLIGENCE

- 11.1 Industry Value Network and Supply Chain Assessment
- 11.2 White-Space and Opportunity Mapping
- 11.3 Product Evolution and Market Life Cycle Analysis
- 11.4 Channel, Distributor, and Go-to-Market Assessment

12 INDUSTRY DEVELOPMENTS AND STRATEGIC INITIATIVES

- 12.1 Mergers and Acquisitions
- 12.2 Partnerships, Alliances, and Joint Ventures
- 12.3 New Product Launches and Certifications
- 12.4 Capacity Expansion and Investments
- 12.5 Other Strategic Initiatives

13 COMPANY PROFILES

- 13.1 Amcor plc
- 13.2 Mondi plc
- 13.3 Sealed Air Corporation
- 13.4 Berry Global Group, Inc.
- 13.5 Celanese Corporation
- 13.6 Eastman Chemical Company
- 13.7 International Paper Company
- 13.8 Stora Enso Oyj
- 13.9 UFlex Limited
- 13.10 Jindal Poly Films Limited
- 13.11 Taghleef Industries S.p.A.
- 13.12 Coveris Management GmbH
- 13.13 Constantia Flexibles Group GmbH
- 13.14 Toray Industries, Inc.
- 13.15 Kuraray Co., Ltd.
- 13.16 Mitsubishi Chemical Group Corporation
- 13.17 Arkema S.A.

List Of Tables

LIST OF TABLES

Table 1 Global Biodegradable Barrier Packaging Films Market Outlook, By Region (2023-2034) (\$MN)

Table 2 Global Biodegradable Barrier Packaging Films Market Outlook, By Film Material (2023-2034) (\$MN)

Table 3 Global Biodegradable Barrier Packaging Films Market Outlook, By Polylactic Acid Films (2023-2034) (\$MN)

Table 4 Global Biodegradable Barrier Packaging Films Market Outlook, By Polyhydroxyalkanoate Films (2023-2034) (\$MN)

Table 5 Global Biodegradable Barrier Packaging Films Market Outlook, By Starch-Based Films (2023-2034) (\$MN)

Table 6 Global Biodegradable Barrier Packaging Films Market Outlook, By Cellulose-Based Films (2023-2034) (\$MN)

Table 7 Global Biodegradable Barrier Packaging Films Market Outlook, By Chitosan-Based Films (2023-2034) (\$MN)

Table 8 Global Biodegradable Barrier Packaging Films Market Outlook, By Barrier Property (2023-2034) (\$MN)

Table 9 Global Biodegradable Barrier Packaging Films Market Outlook, By Oxygen Barrier (2023-2034) (\$MN)

Table 10 Global Biodegradable Barrier Packaging Films Market Outlook, By Moisture Barrier (2023-2034) (\$MN)

Table 11 Global Biodegradable Barrier Packaging Films Market Outlook, By Aroma Barrier (2023-2034) (\$MN)

Table 12 Global Biodegradable Barrier Packaging Films Market Outlook, By Grease Barrier (2023-2034) (\$MN)

Table 13 Global Biodegradable Barrier Packaging Films Market Outlook, By Light Barrier (2023-2034) (\$MN)

Table 14 Global Biodegradable Barrier Packaging Films Market Outlook, By Film Structure (2023-2034) (\$MN)

Table 15 Global Biodegradable Barrier Packaging Films Market Outlook, By Monolayer Films (2023-2034) (\$MN)

Table 16 Global Biodegradable Barrier Packaging Films Market Outlook, By Coated Films (2023-2034) (\$MN)

Table 17 Global Biodegradable Barrier Packaging Films Market Outlook, By Laminated Films (2023-2034) (\$MN)

Table 18 Global Biodegradable Barrier Packaging Films Market Outlook, By Multilayer

Films (2023-2034) (\$MN)

Table 19 Global Biodegradable Barrier Packaging Films Market Outlook, By Extruded Films (2023-2034) (\$MN)

Table 20 Global Biodegradable Barrier Packaging Films Market Outlook, By Packaging Format (2023-2034) (\$MN)

Table 21 Global Biodegradable Barrier Packaging Films Market Outlook, By Pouches (2023-2034) (\$MN)

Table 22 Global Biodegradable Barrier Packaging Films Market Outlook, By Wraps (2023-2034) (\$MN)

Table 23 Global Biodegradable Barrier Packaging Films Market Outlook, By Lidding Films (2023-2034) (\$MN)

Table 24 Global Biodegradable Barrier Packaging Films Market Outlook, By Sachets (2023-2034) (\$MN)

Table 25 Global Biodegradable Barrier Packaging Films Market Outlook, By Overwrap Films (2023-2034) (\$MN)

Table 26 Global Biodegradable Barrier Packaging Films Market Outlook, By End User (2023-2034) (\$MN)

Table 27 Global Biodegradable Barrier Packaging Films Market Outlook, By Food Processing Companies (2023-2034) (\$MN)

Table 28 Global Biodegradable Barrier Packaging Films Market Outlook, By Beverage Companies (2023-2034) (\$MN)

Table 29 Global Biodegradable Barrier Packaging Films Market Outlook, By Pharmaceutical Manufacturers (2023-2034) (\$MN)

Table 30 Global Biodegradable Barrier Packaging Films Market Outlook, By Personal Care Companies (2023-2034) (\$MN)

Table 31 Global Biodegradable Barrier Packaging Films Market Outlook, By Household Product Manufacturers (2023-2034) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) Regions are also represented in the same manner as above.

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