

Circular Packaging Intelligence Market Forecasts to 2034 – Global Analysis By Packaging Type (Rigid Packaging, Flexible Packaging, Semi-Rigid Packaging, Reusable Packaging, Compostable Packaging, Recyclable Packaging and Smart Circular Packaging), Material, Technology, Application, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Circular Packaging Intelligence Market is accounted for \$1.8 billion in 2026 and is expected to reach \$3.5 billion by 2034 growing at a CAGR of 8.6% during the forecast period. Circular packaging intelligence refers to the integrated application of digital technologies, data analytics, and artificial intelligence to design, monitor, optimize, and manage packaging systems that minimize waste and maximize material reuse, recycling, and recovery. These solutions encompass rigid packaging, flexible packaging, semi-rigid packaging, reusable packaging, compostable packaging, recyclable packaging, and smart circular packaging types. Circular packaging intelligence leverages artificial intelligence, blockchain, Internet of Things, digital watermarking, RFID and NFC, cloud analytics, and digital twins to track packaging lifecycles, optimize material flows, and ensure compliance with circular economy standards.

Market Dynamics:

Driver:

Regulatory compliance pressure

Governments worldwide are implementing stringent extended producer responsibility regulations and circular economy mandates that require companies to track, report, and optimize packaging material flows. The European Union's Packaging and Packaging Waste Regulation sets ambitious recycling targets and restricts single-use packaging formats. Corporate sustainability commitments increasingly include measurable circular packaging goals that demand data-driven intelligence platforms. Consumer awareness of packaging waste drives brand-level investment in transparent circular systems. These regulatory and reputational pressures create sustained demand for circular packaging intelligence solutions.

Restraint:

Legacy infrastructure inertia

The packaging industry operates an extensive legacy manufacturing and supply chain infrastructure that was not designed for circular material tracking and intelligence integration. Retrofitting existing production lines with IoT sensors and digital tracking systems involves significant capital expenditure and operational disruption. Many packaging converters lack the technical expertise to implement and maintain intelligence platforms. The diversity of packaging formats and material combinations complicates standardized tracking approaches. These infrastructure challenges slow the pace of circular packaging intelligence adoption across the industry.

Opportunity:

Digital passport integration

The emergence of digital product passports for packaging presents transformative opportunities for circular packaging intelligence platforms to capture and monetize lifecycle data. Digital passports encode material composition, recycling instructions, and environmental impact data directly into packaging through QR codes, RFID tags, or digital watermarks. These passports enable automated sorting at material recovery facilities and provide consumers with transparent recycling guidance. The integration of passport data with blockchain systems creates immutable records of packaging circularity performance. Regulatory momentum toward mandatory digital passports positions intelligence platforms as essential compliance infrastructure.

Threat:

Greenwashing scrutiny

The circular packaging market faces increasing scrutiny from regulators and consumers regarding the accuracy of sustainability claims and the actual environmental benefits of circular systems. Intelligence platforms that generate circularity metrics may be challenged if the underlying data quality or methodology is questioned. Litigation risks associated with misleading environmental claims create liability exposure for platform providers and their clients. The complexity of lifecycle assessment calculations makes it difficult to verify the net environmental benefit of certain circular packaging strategies. These credibility risks may constrain market growth if stakeholders lose confidence in circular packaging intelligence outputs.

Covid-19 Impact:

The COVID-19 pandemic initially disrupted circular packaging programs through supply chain constraints and shifts toward single-use packaging for hygiene reasons. Mid-pandemic, the crisis highlighted vulnerabilities in linear packaging supply chains and accelerated interest in resilient circular systems. E-commerce packaging volumes surged, creating new challenges for recycling infrastructure. Post-pandemic, the emphasis on supply chain resilience and corporate sustainability commitments supports continued investment in circular packaging intelligence. The crisis reinforced the strategic importance of packaging circularity for long-term business continuity.

The recyclable packaging segment is expected to be the largest during the forecast period

The recyclable packaging segment is expected to account for the largest market share during the forecast period, due to its established infrastructure and widespread adoption across consumer and industrial applications. Recyclable packaging formats, including paper, cardboard, glass, and certain plastics, benefit from mature collection and reprocessing systems in developed markets. Consumer familiarity with recycling programs drives consistent demand for recyclable packaging solutions. Corporate sustainability commitments frequently prioritize recyclability as the most achievable near-term circular packaging goal. The economic viability of recyclable material markets supports continued investment in recyclable packaging intelligence and optimization.

The compostable materials segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the compostable materials segment is predicted to witness the highest growth rate, driven by increasing regulatory restrictions on conventional plastics and growing consumer preference for biodegradable packaging alternatives.

Compostable materials offer end-of-life solutions that complement recycling infrastructure in regions with limited reprocessing capacity. Food service and fresh produce applications particularly benefit from compostable packaging that can be disposed of with organic waste. Advances in material science are improving the performance and cost competitiveness of compostable polymers and fiber-based alternatives. Certification standards and industrial composting infrastructure expansion support market growth for compostable packaging intelligence.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, due to strong corporate sustainability commitments and advanced recycling infrastructure across the United States and Canada. The United States leads with extensive extended producer responsibility programs and state-level packaging waste regulations, driving intelligence platform adoption. Major packaging companies, including Amcor, Sealed Air, and Berry Global, are headquartered in North America and invest heavily in circular packaging innovation. Consumer awareness of packaging waste issues supports demand for transparent circularity solutions. The region's mature digital infrastructure enables sophisticated packaging intelligence platform deployment.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, driven by rapid industrialization and government-led waste reduction initiatives across China, India, and Southeast Asian nations. China's national plastic restriction policies and circular economy development plans create substantial demand for packaging intelligence solutions. India's growing consumer market and emerging waste management regulations drive investment in circular packaging infrastructure. Southeast Asian nations face acute plastic pollution challenges that accelerate regulatory action and private sector circular packaging commitments. The region's expanding manufacturing base generates significant packaging volume requiring circular optimization.

Key players in the market

Some of the key players in Circular Packaging Intelligence Market include Amcor plc,

Mondi plc, Smurfit Westrock plc, Berry Global Inc., Sealed Air Corporation, Ball Corporation, Sonoco Products Company, Huhtamaki Oyj, DS Smith plc, Graphic Packaging Holding Company, Tetra Pak International S.A., Stora Enso Oyj, UPM-Kymmene Corporation, International Paper Company, Avery Dennison Corporation, and Sappi Limited.

Key Developments:

In June 2026, Amcor plc launched an AI-powered circular packaging intelligence platform integrating lifecycle assessment tools with real-time material traceability across global supply chains.

In March 2026, DS Smith plc partnered with a major European retailer to deploy circular packaging intelligence optimizing box design and material usage across e-commerce operations.

In February 2026, Tetra Pak International S.A. unveiled a connected packaging platform using RFID technology to track carton recycling rates and consumer engagement with sustainability messaging.

Packaging Types Covered:

Rigid Packaging

Flexible Packaging

Semi-Rigid Packaging

Reusable Packaging

Compostable Packaging

Recyclable Packaging

Smart Circular Packaging

Materials Covered:

Paper & Paperboard

Plastic

Glass

Metal

Fiber-Based Materials

Compostable Materials

Multi-Material Packaging

Technologies Covered:

Artificial Intelligence

Blockchain

Internet of Things (IoT)

Digital Watermarking

RFID & NFC

Cloud Analytics

Digital Twins

Applications Covered:

Food & Beverage

Personal Care & Cosmetics

Healthcare & Pharmaceuticals

Consumer Electronics

E-Commerce

Industrial Packaging

Logistics & Distribution

End Users Covered:

Packaging Manufacturers

Food Processing Companies

Retailers

E-Commerce Companies

Pharmaceutical Companies

FMCG Companies

Recycling Organizations

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 CIRCULAR PACKAGING INTELLIGENCE MARKET, BY PACKAGING TYPE

- 5.1 Rigid Packaging
- 5.2 Flexible Packaging
- 5.3 Semi-Rigid Packaging
- 5.4 Reusable Packaging
- 5.5 Compostable Packaging
- 5.6 Recyclable Packaging
- 5.7 Smart Circular Packaging

6 GLOBAL CIRCULAR PACKAGING INTELLIGENCE MARKET, BY MATERIAL

- 6.1 Paper & Paperboard
- 6.2 Plastic
 - 6.2.1 PET
 - 6.2.2 HDPE
- 6.3 Glass
- 6.4 Metal
- 6.5 Fiber-Based Materials
- 6.6 Compostable Materials
- 6.7 Multi-Material Packaging

7 GLOBAL CIRCULAR PACKAGING INTELLIGENCE MARKET, BY TECHNOLOGY

- 7.1 Artificial Intelligence
- 7.2 Blockchain
- 7.3 Internet of Things (IoT)
- 7.4 Digital Watermarking
- 7.5 RFID & NFC
- 7.6 Cloud Analytics
- 7.7 Digital Twins

8 GLOBAL CIRCULAR PACKAGING INTELLIGENCE MARKET, BY APPLICATION

- 8.1 Food & Beverage
- 8.2 Personal Care & Cosmetics
- 8.3 Healthcare & Pharmaceuticals
- 8.4 Consumer Electronics
- 8.5 E-Commerce
- 8.6 Industrial Packaging
- 8.7 Logistics & Distribution

9 GLOBAL CIRCULAR PACKAGING INTELLIGENCE MARKET, BY END USER

- 9.1 Packaging Manufacturers
- 9.2 Food Processing Companies
- 9.3 Retailers
- 9.4 E-Commerce Companies
- 9.5 Pharmaceutical Companies
- 9.6 FMCG Companies
- 9.7 Recycling Organizations

10 GLOBAL CIRCULAR PACKAGING INTELLIGENCE 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 Smurfit Westrock plc

13.4 Berry Global Inc.

13.5 Sealed Air Corporation

13.6 Ball Corporation

13.7 Sonoco Products Company

13.8 Huhtamaki Oyj

13.9 DS Smith plc

13.10 Graphic Packaging Holding Company

13.11 Tetra Pak International S.A.

13.12 Stora Enso Oyj

13.13 UPM-Kymmene Corporation

13.14 International Paper Company

13.15 Avery Dennison Corporation

13.16 Sappi Limited

List Of Tables

LIST OF TABLES

Table 1 Global Circular Packaging Intelligence Market Outlook, By Region (2023-2034) (\$MN)

Table 2 Global Circular Packaging Intelligence Market Outlook, By Packaging Type (2023-2034) (\$MN)

Table 3 Global Circular Packaging Intelligence Market Outlook, By Rigid Packaging (2023-2034) (\$MN)

Table 4 Global Circular Packaging Intelligence Market Outlook, By Flexible Packaging (2023-2034) (\$MN)

Table 5 Global Circular Packaging Intelligence Market Outlook, By Semi-Rigid Packaging (2023-2034) (\$MN)

Table 6 Global Circular Packaging Intelligence Market Outlook, By Reusable Packaging (2023-2034) (\$MN)

Table 7 Global Circular Packaging Intelligence Market Outlook, By Compostable Packaging (2023-2034) (\$MN)

Table 8 Global Circular Packaging Intelligence Market Outlook, By Recyclable Packaging (2023-2034) (\$MN)

Table 9 Global Circular Packaging Intelligence Market Outlook, By Smart Circular Packaging (2023-2034) (\$MN)

Table 10 Global Circular Packaging Intelligence Market Outlook, By Material (2023-2034) (\$MN)

Table 11 Global Circular Packaging Intelligence Market Outlook, By Paper & Paperboard (2023-2034) (\$MN)

Table 12 Global Circular Packaging Intelligence Market Outlook, By Plastic (2023-2034) (\$MN)

Table 13 Global Circular Packaging Intelligence Market Outlook, By PET (2023-2034) (\$MN)

Table 14 Global Circular Packaging Intelligence Market Outlook, By HDPE (2023-2034) (\$MN)

Table 15 Global Circular Packaging Intelligence Market Outlook, By Glass (2023-2034) (\$MN)

Table 16 Global Circular Packaging Intelligence Market Outlook, By Metal (2023-2034) (\$MN)

Table 17 Global Circular Packaging Intelligence Market Outlook, By Fiber-Based Materials (2023-2034) (\$MN)

Table 18 Global Circular Packaging Intelligence Market Outlook, By Compostable

Materials (2023-2034) (\$MN)

Table 19 Global Circular Packaging Intelligence Market Outlook, By Multi-Material Packaging (2023-2034) (\$MN)

Table 20 Global Circular Packaging Intelligence Market Outlook, By Technology (2023-2034) (\$MN)

Table 21 Global Circular Packaging Intelligence Market Outlook, By Artificial Intelligence (2023-2034) (\$MN)

Table 22 Global Circular Packaging Intelligence Market Outlook, By Blockchain (2023-2034) (\$MN)

Table 23 Global Circular Packaging Intelligence Market Outlook, By Internet of Things (IoT) (2023-2034) (\$MN)

Table 24 Global Circular Packaging Intelligence Market Outlook, By Digital Watermarking (2023-2034) (\$MN)

Table 25 Global Circular Packaging Intelligence Market Outlook, By RFID & NFC (2023-2034) (\$MN)

Table 26 Global Circular Packaging Intelligence Market Outlook, By Cloud Analytics (2023-2034) (\$MN)

Table 27 Global Circular Packaging Intelligence Market Outlook, By Digital Twins (2023-2034) (\$MN)

Table 28 Global Circular Packaging Intelligence Market Outlook, By Application (2023-2034) (\$MN)

Table 29 Global Circular Packaging Intelligence Market Outlook, By Food & Beverage (2023-2034) (\$MN)

Table 30 Global Circular Packaging Intelligence Market Outlook, By Personal Care & Cosmetics (2023-2034) (\$MN)

Table 31 Global Circular Packaging Intelligence Market Outlook, By Healthcare & Pharmaceuticals (2023-2034) (\$MN)

Table 32 Global Circular Packaging Intelligence Market Outlook, By Consumer Electronics (2023-2034) (\$MN)

Table 33 Global Circular Packaging Intelligence Market Outlook, By E-Commerce (2023-2034) (\$MN)

Table 34 Global Circular Packaging Intelligence Market Outlook, By Industrial Packaging (2023-2034) (\$MN)

Table 35 Global Circular Packaging Intelligence Market Outlook, By Logistics & Distribution (2023-2034) (\$MN)

Table 36 Global Circular Packaging Intelligence Market Outlook, By End User (2023-2034) (\$MN)

Table 37 Global Circular Packaging Intelligence Market Outlook, By Packaging Manufacturers (2023-2034) (\$MN)

Table 38 Global Circular Packaging Intelligence Market Outlook, By Food Processing Companies (2023-2034) (\$MN)

Table 39 Global Circular Packaging Intelligence Market Outlook, By Retailers (2023-2034) (\$MN)

Table 40 Global Circular Packaging Intelligence Market Outlook, By E-Commerce Companies (2023-2034) (\$MN)

Table 41 Global Circular Packaging Intelligence Market Outlook, By Pharmaceutical Companies (2023-2034) (\$MN)

Table 42 Global Circular Packaging Intelligence Market Outlook, By FMCG Companies (2023-2034) (\$MN)

Table 43 Global Circular Packaging Intelligence Market Outlook, By Recycling Organizations (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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