

Edible & Water-Soluble Packaging Films Market Forecasts to 2034 - Global Analysis By Film Type (Single-Layer Films, Multi-Layer Films and Composite Films), Material Type, Packaging Format, Application, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Edible & Water-Soluble Packaging Films Market is accounted for \$1.8 billion in 2026 and is expected to reach \$5.7 billion by 2034 growing at a CAGR of 15.2% during the forecast period. Edible & Water-Soluble Packaging Films represent sustainable alternatives to traditional plastic packaging, offering functional protection while helping minimize packaging waste. Edible variants are produced using food-compatible materials, including starch, proteins, and polysaccharides, and can be consumed alongside packaged products. Water-soluble films are engineered to dissolve in water, enabling convenient handling, disposal, and product delivery. Their biodegradable and low-waste characteristics make them suitable for food, beverage, pharmaceutical, and other applications, particularly where portion packaging, single-use formats, and environmentally responsible solutions are increasingly required.

According to the OECD, global plastic waste generation reached 353 million tonnes in 2019, with 40% originating from packaging, highlighting the substantial scale of packaging-related plastic waste and the need for alternative packaging materials.

Market Dynamics:

Driver:

Growing demand for sustainable packaging

Rising interest in environmentally responsible packaging is accelerating adoption of edible and water-soluble films. Companies and consumers are looking for substitutes for traditional plastics due to increasing concerns about long-lasting packaging waste and ecological impacts. Films produced from renewable biopolymers can provide functional packaging while reducing waste generated after consumption. Water-soluble formats additionally offer convenient dissolution and disposal characteristics. These advantages are encouraging manufacturers to introduce sustainable packaging solutions for food, beverages, pharmaceuticals, and household products, particularly in applications requiring smaller portions and convenient single-use formats.

Restraint:

Higher production costs

Elevated manufacturing expenses represent a significant limitation for edible and water-soluble packaging films. Production may involve specialized equipment, carefully controlled processing environments, suitable food-grade inputs, and additional testing procedures. Some film materials also have higher costs than conventional plastics because production volumes and supply availability remain comparatively limited. Such cost pressures can slow adoption among manufacturers operating with tight margins. Industries that prioritize low packaging costs may continue using established plastic films when they provide economical, widely available, and familiar packaging performance for their products.

Opportunity:

Expansion of biodegradable and compostable packaging applications

Growing adoption of biodegradable and compostable packaging solutions offers considerable opportunities for edible and water-soluble films. Food manufacturers, retailers, and consumer-product companies are increasingly examining alternatives to conventional plastics to support environmental objectives. Edible films can be incorporated into products such as snacks and confectionery, whereas water-soluble films can enable convenient single-dose and portion packaging. Advances in bio-based polymer formulations, enhanced functional properties, and stronger sustainability requirements could broaden the use of these films across multiple product categories, industries, and geographic markets worldwide.

Threat:

Competition from advanced conventional and alternative sustainable packaging

Competition from established plastic packaging and emerging sustainable materials may challenge the expansion of edible and water-soluble films. Conventional films continue to benefit from mature production networks, reliable supply chains, consistent performance, and economies of scale. At the same time, paper-based, compostable, biodegradable polymer, and other environmentally oriented packaging options are developing quickly. These competing materials can target similar applications. Film producers therefore need ongoing improvements in performance, affordability, durability, and environmental attributes to differentiate their solutions and remain competitive across various packaging sectors.

Covid-19 Impact:

COVID-19 affected the Edible & Water-Soluble Packaging Films Market by disrupting production, logistics, labor availability, and development activities. Restrictions created difficulties in sourcing and transporting raw materials and temporarily reduced manufacturing capacity. Changes in consumer behavior also altered packaging demand, with reduced foodservice activity affecting some applications while demand for packaged food and household products increased. Greater attention to hygiene supported interest in convenient single-use and low-contact packaging. Following the easing of restrictions, production operations, supply chains, and market activities progressively stabilized across regions.

The multi-layer films segment is expected to be the largest during the forecast period

The multi-layer films segment is expected to account for the largest market share during the forecast period because their layered construction enables several functional properties within a single packaging structure. Combining different materials can improve strength, flexibility, moisture resistance, barrier performance, and overall stability compared with basic film formats. This approach allows packaging manufacturers to tailor film structures according to particular application requirements while integrating edible or water-soluble components with functional materials. Their adaptability supports applications requiring enhanced protection, controlled dissolution, durability, and dependable packaging functionality across food, pharmaceutical, household, and other product categories.

The healthcare & pharma segment is expected to have the

highest CAGR during the forecast period

Over the forecast period, the healthcare & pharma segment is predicted to witness the highest growth rate due to the need for hygienic, convenient, and accurately portioned packaging solutions. Water-soluble formats can support measured dosing while limiting direct product contact, whereas edible films may serve selected oral and nutritional applications. Demand for single-use packaging, easier administration, improved hygiene, and efficient delivery can create additional opportunities within healthcare-related applications. Advances in film materials and formulation technologies could further enhance functionality and encourage broader adoption across pharmaceutical and healthcare packaging uses.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, driven by expanding food, pharmaceutical, household, and consumer-product sectors. Rising demand for convenient packaging is accompanied by efforts to reduce dependence on traditional plastics. Major countries such as China, Japan, India, and South Korea are advancing sustainable packaging development and commercialization. Expanding manufacturing capacity, rapid e-commerce growth, urbanization, food delivery services, and increasing environmental awareness are also encouraging adoption, creating broader opportunities for edible and water-soluble packaging films.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, driven by expanding food production, stronger sustainability preferences, and efforts to limit traditional plastic packaging. China, India, Japan, and South Korea are developing innovative packaging solutions and increasing adoption of environmentally friendly materials. Rapid urbanization, expanding e-commerce, food delivery services, and household consumption are supporting demand for convenient packaging. Growing regional manufacturing capacity and sustainability-focused initiatives are further creating favorable conditions for market expansion.

Key players in the market

Some of the key players in Edible & Water-Soluble Packaging Films Market include Monosol LLC, Notpla Limited, Xampla, WikiFoods Inc., Loliware Inc., TIPA Corp Ltd., Tate & Lyle PLC, Ingredion Incorporated, Devro plc, JRF Technology LLC, Tianjin

Norland Biotech Co., Ltd., Evoware, Lactips, Arrow GreenTech Ltd., Jiangmen Proudly Water-Soluble Plastic Co., Ltd., Mitsubishi Chemical Group Corporation, Sekisui Chemical Co., Ltd. and Aicello Corporation.

Key Developments:

In June 2026, Tate & Lyle PLC has agreed to a ?2.7 billion takeover by US ingredients group Ingredion, confirming a deal that was first proposed last month. Under the terms of the recommended acquisition, shareholders in the FTSE 250-listed group will receive 595p in cash for each share, and be entitled to retain a final dividend of up to 13.2p for the 2026 financial year and an interim dividend of up to 6.8p for the first half of the 2027 financial year.

In September 2025, Mitsubishi Chemical Corporation has officially announced that it has entered into an Agreement on Coordination and Cooperation for the Maintenance and Development of the Yokkaichi Industrial Complex. This agreement, involves three parties—Mitsubishi Chemical, Mie Prefecture, and Yokkaichi City.

Film Types Covered:

Single-Layer Films

Multi-Layer Films

Composite Films

Material Types Covered:

Starch-Based Films

Gelatin-Based Films

Pullulan Films

Polyvinyl Alcohol (PVA) Films

Other Biopolymer Films

Packaging Formats Covered:

Pouches & Sachets

Wraps & Sheets

Capsules & Pods

Bags & Liners

Other Formats

Applications Covered:

Food & Beverages

Pharmaceuticals & Nutraceuticals

Personal Care & Cosmetics

Household Products

Industrial Chemicals

Other Applications

End Users Covered:

FMCG

Healthcare & Pharma

Retail & E-Commerce

Industrial & Chemical

Other End Users

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 EDIBLE & WATER-SOLUBLE PACKAGING FILMS MARKET, BY FILM TYPE

- 5.1 Single-Layer Films
- 5.2 Multi-Layer Films
- 5.3 Composite Films

6 GLOBAL EDIBLE & WATER-SOLUBLE PACKAGING FILMS MARKET, BY MATERIAL TYPE

- 6.1 Starch-Based Films
- 6.2 Gelatin-Based Films
- 6.3 Pullulan Films
- 6.4 Polyvinyl Alcohol (PVA) Films
- 6.5 Other Biopolymer Films

7 GLOBAL EDIBLE & WATER-SOLUBLE PACKAGING FILMS MARKET, BY PACKAGING FORMAT

- 7.1 Pouches & Sachets
- 7.2 Wraps & Sheets
- 7.3 Capsules & Pods
- 7.4 Bags & Liners
- 7.5 Other Formats

8 GLOBAL EDIBLE & WATER-SOLUBLE PACKAGING FILMS MARKET, BY APPLICATION

- 8.1 Food & Beverages
- 8.2 Pharmaceuticals & Nutraceuticals
- 8.3 Personal Care & Cosmetics
- 8.4 Household Products
- 8.5 Industrial Chemicals
- 8.6 Other Applications

9 GLOBAL EDIBLE & WATER-SOLUBLE PACKAGING FILMS MARKET, BY END USER

- 9.1 FMCG
- 9.2 Healthcare & Pharma
- 9.3 Retail & E-Commerce
- 9.4 Industrial & Chemical
- 9.5 Other End Users

10 GLOBAL EDIBLE & WATER-SOLUBLE 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 Monosol LLC

- 13.2 Notpla Limited
- 13.3 Xampla
- 13.4 WikiFoods Inc.
- 13.5 Loliware Inc.
- 13.6 TIPA Corp Ltd.
- 13.7 Tate & Lyle PLC
- 13.8 Ingredion Incorporated
- 13.9 Devro plc
- 13.10 JRF Technology LLC
- 13.11 Tianjin Norland Biotech Co., Ltd.
- 13.12 Evoware
- 13.13 Lactips
- 13.14 Arrow GreenTech Ltd.
- 13.15 Jiangmen Proudly Water-Soluble Plastic Co., Ltd.
- 13.16 Mitsubishi Chemical Group Corporation
- 13.17 Sekisui Chemical Co., Ltd.
- 13.18 Aicello Corporation

List of Tables

- Table 1 Global Edible & Water-Soluble Packaging Films Market Outlook, By Region (2023-2034) (\$MN)
- Table 2 Global Edible & Water-Soluble Packaging Films Market Outlook, By Film Type (2023-2034) (\$MN)
- Table 3 Global Edible & Water-Soluble Packaging Films Market Outlook, By Single-Layer Films (2023-2034) (\$MN)
- Table 4 Global Edible & Water-Soluble Packaging Films Market Outlook, By Multi-Layer Films (2023-2034) (\$MN)
- Table 5 Global Edible & Water-Soluble Packaging Films Market Outlook, By Composite Films (2023-2034) (\$MN)
- Table 6 Global Edible & Water-Soluble Packaging Films Market Outlook, By Material Type (2023-2034) (\$MN)
- Table 7 Global Edible & Water-Soluble Packaging Films Market Outlook, By Starch-Based Films (2023-2034) (\$MN)
- Table 8 Global Edible & Water-Soluble Packaging Films Market Outlook, By Gelatin-Based Films (2023-2034) (\$MN)
- Table 9 Global Edible & Water-Soluble Packaging Films Market Outlook, By Pullulan Films (2023-2034) (\$MN)
- Table 10 Global Edible & Water-Soluble Packaging Films Market Outlook, By Polyvinyl Alcohol (PVA) Films (2023-2034) (\$MN)
- Table 11 Global Edible & Water-Soluble Packaging Films Market Outlook, By Other

Biopolymer Films (2023-2034) (\$MN)

Table 12 Global Edible & Water-Soluble Packaging Films Market Outlook, By Packaging Format (2023-2034) (\$MN)

Table 13 Global Edible & Water-Soluble Packaging Films Market Outlook, By Pouches & Sachets (2023-2034) (\$MN)

Table 14 Global Edible & Water-Soluble Packaging Films Market Outlook, By Wraps & Sheets (2023-2034) (\$MN)

Table 15 Global Edible & Water-Soluble Packaging Films Market Outlook, By Capsules & Pods (2023-2034) (\$MN)

Table 16 Global Edible & Water-Soluble Packaging Films Market Outlook, By Bags & Liners (2023-2034) (\$MN)

Table 17 Global Edible & Water-Soluble Packaging Films Market Outlook, By Other Formats (2023-2034) (\$MN)

Table 18 Global Edible & Water-Soluble Packaging Films Market Outlook, By Application (2023-2034) (\$MN)

Table 19 Global Edible & Water-Soluble Packaging Films Market Outlook, By Food & Beverages (2023-2034) (\$MN)

Table 20 Global Edible & Water-Soluble Packaging Films Market Outlook, By Pharmaceuticals & Nutraceuticals (2023-2034) (\$MN)

Table 21 Global Edible & Water-Soluble Packaging Films Market Outlook, By Personal Care & Cosmetics (2023-2034) (\$MN)

Table 22 Global Edible & Water-Soluble Packaging Films Market Outlook, By Household Products (2023-2034) (\$MN)

Table 23 Global Edible & Water-Soluble Packaging Films Market Outlook, By Industrial Chemicals (2023-2034) (\$MN)

Table 24 Global Edible & Water-Soluble Packaging Films Market Outlook, By Other Applications (2023-2034) (\$MN)

Table 25 Global Edible & Water-Soluble Packaging Films Market Outlook, By End User (2023-2034) (\$MN)

Table 26 Global Edible & Water-Soluble Packaging Films Market Outlook, By FMCG (2023-2034) (\$MN)

Table 27 Global Edible & Water-Soluble Packaging Films Market Outlook, By Healthcare & Pharma (2023-2034) (\$MN)

Table 28 Global Edible & Water-Soluble Packaging Films Market Outlook, By Retail & E-Commerce (2023-2034) (\$MN)

Table 29 Global Edible & Water-Soluble Packaging Films Market Outlook, By Industrial & Chemical (2023-2034) (\$MN)

Table 30 Global Edible & Water-Soluble Packaging Films Market Outlook, By Other End Users (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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