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Flexible Plastic Packaging Coating Market Forecasts to 2032 – Global Analysis By Coating Type (Epoxy Coatings, Acrylic Coatings, Urethane & Polyurethane Coatings, Lacquer Coatings, Plasma Coatings, Polyester Coatings, Phenolic Coatings, Water-Based Coatings, Solvent-Based Coatings, UV-Curable Coatings and Other Coating Types), Material Type, Application, End User and By Geography

https://marketpublishers.com/r/FD330DD826B8EN.html
Date: June 2025
Pages: 150
Price: US$ 4,150.00 (Single User License)
ID: FD330DD826B8EN

Abstracts

According to Stratistics MRC, the Global Flexible Plastic Packaging Coating Market is accounted for $5.10 billion in 2025 and is expected to reach $8.08 billion by 2032 growing at a CAGR of 6.8% during the forecast period. The process of applying specialized materials to flexible plastic substrates in order to improve their functionality, performance, and durability is known as flexible plastic packaging coating. These coatings have a number of uses, including strengthening mechanical strength, improving printability, offering heat resistance, and improving barrier qualities against light, oxygen, and moisture. Moreover, these coatings, which help prolong product shelf life and guarantee product safety, are frequently used in food, pharmaceutical, personal care, and industrial packaging. Materials that provide a balance between flexibility and protection without sacrificing the lightweight and affordable nature of flexible plastic packaging include acrylics, polyurethanes, and polyvinylidene chloride (PVDC).

According to the Flexible Packaging Association (FPA), the U.S. flexible packaging industry was estimated to be $42.9 billion in annual sales for 2022, with projections indicating growth to $44.7 billion in 2023. Additionally, flexible packaging represents 21% of the $180.3 billion U.S. packaging industry, making it the second-largest

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packaging segment behind corrugated paper at 22%.

Market Dynamics:

Driver:

Growing interest in processed and packaged foods

Convenient, readily consumable, and long-lasting food items are becoming more and more popular among consumers as a result of the global trend toward urban lifestyles and dual-income households. Because they offer superior barrier qualities, flexible plastic packaging coatings are essential for maintaining the safety, flavor, and freshness of these foods. Coatings aid in preventing food quality degradation from oxygen, moisture, and UV light. Additionally, the rapid increase in processed food consumption in developing economies, particularly in Asia-Pacific and Latin America, is driving up demand for coated flexible packaging.

Restraint:

Environmental issues and laws regarding plastic waste

Due to their role in persistent environmental pollution, governments and environmental organizations worldwide are increasingly focusing on single-use plastics, including flexible packaging. Many flexible plastic films with coatings are challenging to recycle, particularly multi-layered structures with mixed material compositions, despite their low weight and low material consumption. By adding chemical additives that are difficult to separate, coatings can make recycling even more difficult. Global plastic bags and extended producer responsibility (EPR) regulations are forcing businesses to rethink or cut back on the use of coated flexible plastics, which is slowing market growth in some areas.

Opportunity:

Growth in the need for recyclable and sustainable coatings

The creation of environmentally friendly coatings that complement the circular economy is one of the most exciting prospects. Governments, businesses, and consumers are all pushing for more environmentally friendly packaging options. Water-based, compostable, or bio-based coatings that can be applied to recyclable mono-material

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films are now in high demand as a result. Businesses that make such investments stand to gain access to a premium market segment as well as advantageous government incentives and regulatory frameworks that promote green packaging technologies. Furthermore, this opportunity is further strengthened by the development of easily separable multi-layer systems and de-inkable coatings.

Threat:

Technical difficulties in reusing coated materials

Multi-material laminates that are challenging to process with conventional recycling infrastructure are frequently found in coated flexible packaging structures. When coatings are chemically bonded to the substrate or heat-resistant, they can obstruct the recovery of polymers, ink, or materials. Due to this technical difficulty, the amount of post-consumer recycled (PCR) material that can be obtained from such packaging is limited, and its attractiveness is diminished in areas with inadequate recycling infrastructure. Moreover, coated flexible packaging's difficulty in recycling could become a significant competitive disadvantage as recyclability becomes a crucial criterion for both purchasing and regulations.

Covid-19 Impact:

The market for flexible plastic packaging coating was affected by the COVID-19 pandemic in a variety of ways. On the one hand, the use of coated flexible packaging increased as demand rose in critical industries like food, pharmaceuticals, and personal care, where hygienic practices, barrier protection, and longer shelf life became critical. This trend was further accelerated by the growth of home deliveries and e-commerce. However, the industry also had to deal with issues like labor shortages, supply chain disruptions, and shortages of raw materials, which made it difficult to meet delivery and production deadlines. Furthermore, the overall growth was somewhat offset by a brief decline in demand from non-essential industries like luxury goods and cosmetics.

The water-based coatings segment is expected to be the largest during the forecast period

The water-based coatings segment is expected to account for the largest market share during the forecast period. Due to their low or zero volatile organic compound (VOC) emissions, which are in line with worldwide sustainability trends, these coatings are favored for use in food, pharmaceutical, and personal care packaging. Water-based

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coatings are perfect for flexible substrates like polyethylene and polypropylene films because they have outstanding adhesion, printability, and barrier qualities. Their continued dominance in the market across developed and emerging regions is being driven by their growing adoption, which is bolstered by government regulations that favor eco-friendly solutions and rising demand from major FMCG brands that prioritize sustainable packaging.

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

Over the forecast period, the barrier coatings segment is predicted to witness the highest growth rate. because packaging that maintains content integrity and prolongs product shelf life is becoming more and more in demand. For food, beverage, pharmaceutical, and medical applications, these coatings are essential because they greatly increase resistance to moisture, oxygen, grease, and other external contaminants. Barrier coatings are becoming more and more popular as a result of the need to reduce food waste, improve product protection during transportation, and adhere to strict packaging regulations. This market is positioned as a major force behind sustainable packaging solutions of the future owing to advancements in recyclable and bio-based barrier coatings.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, fueled by growing packaging industries, quick industrialization, and increased consumer demand in nations like China, India, and Japan. The demand for sophisticated flexible packaging solutions with improved barrier and protective coatings is further driven by the expansion of the food and beverage, pharmaceutical, and e-commerce industries. The region's dominance is also influenced by growing investments in technological advancements and manufacturing infrastructure. Moreover, Asia-Pacific is now the world's leading region for flexible plastic packaging coating due to its affordable production capabilities and expanding urban population, which are driving market expansion.

Region with highest CAGR:

Over the forecast period, the Middle East & Africa region is anticipated to exhibit the highest CAGR. The expansion of the retail and e-commerce industries in nations like the United Arab Emirates, Saudi Arabia, and South Africa, as well as the growing

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demand for packaged foods and medications, are the main drivers of this growth. Demand for cutting-edge coating technologies is also being driven by increased consumer awareness of product safety and longer shelf life. Additionally, MEA is a promising emerging market for flexible plastic packaging coatings because of investments in infrastructure development and the adoption of creative packaging solutions, which accelerate market growth in the region.

Key players in the market

Some of the key players in Flexible Plastic Packaging Coating Market include BASF SE, Kansai Paint Co., Ltd., Akzo Nobel N.V., Koninklijke DSM N.V., Bostik SA, Michelman, Inc., Jamestown Coating Technologies Company, Paramelt B.V., American Packaging Corporation, Sierra Coating Technologies LLC, Allnex Group, PPG Industries, Inc., Schmid Rhyner AG, Wacker Chemie AG and Plasmatreat GmbH.

Key Developments:

In February 2025, Akzo Nobel India has finalised a deal to sell its powder coatings business and International Research Centre (R&D) to its parent company, AkzoNobel N.V., for Rs 20.73 billion and Rs 700 million, respectively. The agreement also includes the transfer of intellectual property rights related to the decorative paints business in India, Bangladesh, Bhutan, and Nepal for Rs 11.52 billion.

In December 2024, BASF announced that it has signed a binding agreement to sell its Food & Health Performance Ingredients business to Louis Dreyfus Co. (LDC), a leading global merchant and processor of agricultural goods including high-quality, plant-based ingredients. The agreement includes a production site and state-of-the-art research and development center in Illertissen, Germany, and three application labs outside of Germany.

In October 2024, Kansai Nerolac Paints announced that its board has approved the sale of a land parcel in Mumbai for Rs 726 crore, according to an exchange filing on the BSE. The paint maker's board has okayed its proposal to enter into an agreement with Aethon Developers Pvt. for sale of the property that is located in Mumbai's Lower Parel area.

Coating Types Covered:

- Epoxy Coatings

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- Acrylic Coatings
- Urethane & Polyurethane Coatings
- Lacquer Coatings
- Plasma Coatings
- Polyester Coatings
- Phenolic Coatings
- Water-Based Coatings
- Solvent-Based Coatings
- UV-Curable Coatings
- Other Coating Types

Material Types Covered:

- Polyethylene (PE)
- Polypropylene
- Polyethylene Terephthalate (PET)
- Polyamide (PA)
- Polyvinyl Chloride (PVC)
- Polyvinylidene Chloride (PVDC)
- Ethylene Vinyl Alcohol (EVOH)
- Polystyrene (PS)

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Other Material Types

Applications Covered:

Decorative

Protective

Heat Seal

Print Primer

Barrier Coatings

Other Applications

End Users Covered:

Food & Beverage Packaging

Pharmaceutical Packaging

Cosmetics & Personal Care Packaging

Chemical Packaging

Consumer Durables/Electronic Goods Packaging

Automotive & Allied Packaging

Other End Users

Regions Covered:

North America

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- US
- Canada
- Mexico

Europe

- Germany
- UK
- Italy
- France
- Spain
- Rest of Europe

Asia Pacific

- Japan
- China
- India
- Australia
- New Zealand
- South Korea
- Rest of Asia Pacific

South America

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- Argentina
- Brazil
- Chile
- Rest of South America

Middle East & Africa

- Saudi Arabia
- UAE
- Qatar
- South Africa
- Rest of Middle East & 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 2024, 2025, 2026, 2028, and 2032
- 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:

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- Company Profiling

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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

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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