

Frozen Food Packaging Market Forecasts to 2034 – Global Analysis By Packaging Type (Bags, Pouches, Boxes, Cartons, Trays, Containers, Films and Wraps, and Other Packaging Types), Material, Food Type, Packaging Format, Distribution Channel, and By Geography

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Abstracts

According to Statistics MRC, the Global Frozen Food Packaging Market is accounted for \$56.0 billion in 2026 and is expected to reach \$88.7 billion by 2034 growing at a CAGR of 5.9% during the forecast period. Frozen food packaging encompasses materials and solutions designed to protect, preserve, and transport frozen food products at sub-zero temperatures. This market includes bags, pouches, boxes, cartons, trays, containers, films, wraps, and other packaging types manufactured from plastic, paper and paperboard, metal, glass, and bio-based materials. The market serves frozen fruits and vegetables, frozen meat and seafood, frozen ready meals, frozen bakery products, and frozen desserts. Growing frozen food consumption, increasing demand for convenience foods, and expanding cold chain infrastructure are key drivers of market expansion.

Market Dynamics:

Driver:

Increasing consumption of frozen convenience foods

The growing consumption of frozen convenience foods is a primary driver for the frozen food packaging market. Busy lifestyles and changing eating habits have increased

demand for ready-to-cook and ready-to-eat frozen products. Frozen foods offer extended shelf life, reduced food waste, and year-round availability of seasonal products. The expansion of frozen food product ranges including ethnic cuisines, plant-based options, and premium offerings has broadened consumer appeal. Retail availability of frozen foods across supermarkets and online platforms supports market growth. As consumers seek convenient meal solutions, frozen food consumption continues expanding, driving packaging demand across all product categories.

Restraint:

Environmental concerns regarding packaging waste

Growing environmental concerns about packaging waste represent a significant restraint for the frozen food packaging market. Frozen food packaging relies heavily on plastic and multi-layer materials to provide moisture barriers and protect against freezer burn, creating waste management challenges. Consumer awareness of plastic pollution and demand for sustainable packaging are increasing. Regulatory restrictions on single-use plastics and packaging waste in various regions are affecting packaging material choices. The challenge of balancing sustainability with product protection at frozen temperatures creates complexity for packaging manufacturers. These environmental pressures are driving significant packaging innovation and material substitution.

Opportunity:

Development of sustainable and bio-based packaging solutions

The growing demand for environmentally friendly packaging presents significant opportunities for frozen food packaging market expansion. Manufacturers are developing biodegradable, compostable, and recyclable alternatives to traditional plastic frozen food packaging. Bio-based materials including plant-based polymers and paper-based solutions with barrier coatings are emerging as sustainable options. Innovations in mono-material flexible films are enabling recyclable alternatives to multi-layer laminates. Compostable packaging solutions for frozen food applications are gaining traction. As consumer preference for sustainable packaging increases and regulations tighten, demand for eco-friendly frozen food packaging solutions accelerates, creating substantial growth opportunities for innovative manufacturers.

Threat:

Fluctuating raw material costs and supply chain volatility

Volatile raw material costs and supply chain uncertainties pose significant threats to the frozen food packaging market. Packaging materials including plastics, paper, and metals are subject to price fluctuations driven by energy costs, raw material availability, and global trade dynamics. Supply chain disruptions including logistics bottlenecks and raw material shortages affect production and distribution. The frozen food industry's dependence on timely packaging supply creates vulnerability to disruptions. Geopolitical tensions and trade policies affect global material flows. These cost and supply uncertainties challenge manufacturer profitability and product pricing stability, potentially affecting market growth in price-sensitive segments.

Covid-19 Impact:

The COVID-19 pandemic significantly impacted the frozen food packaging market. Lockdowns and restrictions on dining out drove frozen food sales as consumers stocked up on shelf-stable and convenient meal solutions. Retail frozen food sales surged while foodservice demand declined. Supply chain disruptions including packaging material availability and production capacity constraints affected industry operations. Food safety concerns heightened demand for hygienic and tamper-evident packaging solutions. E-commerce frozen food sales accelerated, creating demand for insulated shipping packaging. Post-pandemic, elevated frozen food consumption has sustained, with the crisis permanently changing consumer shopping behavior and frozen food purchasing patterns.

The Bags segment is expected to be the largest during the forecast period

The Bags segment is expected to account for the largest market share during the forecast period, driven by extensive use for frozen vegetables, fruits, and bulk frozen products. Bags offer cost-effective packaging solutions with flexible formats suitable for various product sizes. These bags provide moisture barriers, freezer burn protection, and convenience features including resealable closures. The segment benefits from widespread use across retail and foodservice frozen food categories. High volume applications including frozen vegetables represent substantial bag consumption. As frozen food consumption grows and consumer preference for convenient packaging increases, bags maintain dominant market position throughout the forecast period.

The Bio-based Materials segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Bio-based Materials segment is predicted to witness the highest growth rate, fueled by increasing consumer demand for sustainable packaging and tightening environmental regulations. Bio-based materials derived from renewable sources including corn starch, sugarcane, and cellulose offer renewable alternatives to petroleum-based plastics. These materials are gaining traction in frozen food packaging applications due to their compostability and reduced carbon footprint. Manufacturers are developing bio-based materials with enhanced barrier properties suitable for frozen temperatures. As sustainability becomes a competitive priority for food brands, bio-based packaging adoption accelerates from small bases, delivering the fastest material segment growth.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, driven by high frozen food consumption, established cold chain infrastructure, and the presence of major packaging and food manufacturers. The United States represents one of the world's largest frozen food markets, with diverse product categories including frozen entrees, vegetables, and desserts. Strong retail sector and consumer preference for convenience products support packaging demand. Regulatory requirements and food safety standards drive packaging quality and innovation. With significant frozen food production and consumption, North America maintains its dominant market position.

Region with highest CAGR:

Over the forecast period, the Asia-Pacific region is anticipated to exhibit the highest CAGR, driven by increasing frozen food consumption, expanding cold chain infrastructure, and rapid urbanization. Countries including China, India, and Southeast Asia are experiencing rising demand for frozen convenience foods. Expanding retail infrastructure and supermarket penetration increase frozen food availability. Improving cold chain logistics, including refrigerated transportation and warehousing, support frozen food distribution. Growing middle-class populations seeking convenient meal solutions drive frozen food consumption. As frozen food adoption accelerates across the region, Asia Pacific delivers the fastest frozen food packaging market growth globally.

Key players in the market

Some of the key players in Frozen Food Packaging Market include Amcor plc, Berry Global Group, Inc., Sealed Air Corporation, Sonoco Products Company, Mondi plc, Huhtamaki Oyj, Constantia Flexibles Group GmbH, Coveris Holdings S.A., Winpak Ltd., ProAmpac LLC, Graphic Packaging International, LLC, Smurfit Westrock plc, DS Smith Plc, Tetra Pak International S.A., AptarGroup, Inc., UFlex Limited, LC Packaging International BV, and Clondalkin Group Holdings B.V.

Key Developments:

In May 2026, Smurfit Westrock launched its updated 'Better Planet Packaging' target report, following a major corporate synergy push that eliminated 600,000 tons of high-cost, inefficient production capacity to focus entirely on high-performance, lower-carbon corrugated and folding carton infrastructures.

In April 2026, Mondi unveiled its Interpack 2026 sustainable roadmap, coordinating live equipment trials alongside 15 Original Equipment Manufacturers (OEMs) to demonstrate high-tensile paper-based alternatives, such as its Ad/Vantage StretchWrap line, running on active secondary frozen bundling lines.

In January 2026, Amcor launched its Liquiflex® AV VFFS packaging systems at the International Production & Processing Expo (IPPE) in Atlanta, introducing optimized, airless multi-barrier structures explicitly tailored to handle rigorous thermal extremes across frozen, refrigerated, and shelf-stable food distribution paths.

Packaging Types Covered:

Bags

Pouches

Boxes

Cartons

Trays

Containers

Films and Wraps

Other Packaging Types

Materials Covered:

Plastic

Paper and Paperboard

Metal

Glass

Bio-based Materials

Food Types Covered:

Frozen Meat

Frozen Seafood

Frozen Fruits and Vegetables

Frozen Bakery Products

Frozen Ready Meals

Frozen Dairy Products

Frozen Desserts

Other Food Types

Packaging Formats Covered:

Flexible Packaging

Rigid Packaging

Semi-Rigid Packaging

Distribution Channels Covered:

Retail

Foodservice

E-commerce

Wholesale

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

Frozen Food Packaging Market Forecasts to 2034 – Global Analysis By Packaging Type (Bags, Pouches, Boxes, Cart...

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 FROZEN FOOD PACKAGING MARKET, BY PACKAGING TYPE

- 5.1 Bags
- 5.2 Pouches
- 5.3 Boxes
- 5.4 Cartons
- 5.5 Trays
- 5.6 Containers
- 5.7 Films and Wraps
- 5.8 Other Packaging Types

6 GLOBAL FROZEN FOOD PACKAGING MARKET, BY MATERIAL

- 6.1 Plastic
- 6.2 Paper and Paperboard
- 6.3 Metal
- 6.4 Glass
- 6.5 Bio-based Materials

7 GLOBAL FROZEN FOOD PACKAGING MARKET, BY FOOD TYPE

- 7.1 Frozen Meat
- 7.2 Frozen Seafood
- 7.3 Frozen Fruits and Vegetables
- 7.4 Frozen Bakery Products
- 7.5 Frozen Ready Meals
- 7.6 Frozen Dairy Products
- 7.7 Frozen Desserts
- 7.8 Other Food Types

8 GLOBAL FROZEN FOOD PACKAGING MARKET, BY PACKAGING FORMAT

- 8.1 Flexible Packaging
- 8.2 Rigid Packaging
- 8.3 Semi-Rigid Packaging

9 GLOBAL FROZEN FOOD PACKAGING MARKET, BY DISTRIBUTION CHANNEL

- 9.1 Retail
- 9.2 Foodservice
- 9.3 E-commerce
- 9.4 Wholesale

10 GLOBAL FROZEN FOOD PACKAGING 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 Berry Global Group, Inc.
- 13.3 Sealed Air Corporation

- 13.4 Sonoco Products Company
- 13.5 Mondi plc
- 13.6 Huhtamaki Oyj
- 13.7 Constantia Flexibles Group GmbH
- 13.8 Coveris Holdings S.A.
- 13.9 Wipak Ltd.
- 13.10 ProAmpac LLC
- 13.11 Graphic Packaging International, LLC
- 13.12 Smurfit Westrock plc
- 13.13 DS Smith Plc
- 13.14 Tetra Pak International S.A.
- 13.15 AptarGroup, Inc.
- 13.16 UFlex Limited
- 13.17 LC Packaging International BV
- 13.18 Clondalkin Group Holdings B.V.

List Of Tables

LIST OF TABLES

Table 1 Global Frozen Food Packaging Market Outlook, By Region (2023–2034) (\$MN)
Table 2 Global Frozen Food Packaging Market Outlook, By Packaging Type (2023–2034) (\$MN)
Table 3 Global Frozen Food Packaging Market Outlook, By Bags (2023–2034) (\$MN)
Table 4 Global Frozen Food Packaging Market Outlook, By Pouches (2023–2034) (\$MN)
Table 5 Global Frozen Food Packaging Market Outlook, By Boxes (2023–2034) (\$MN)
Table 6 Global Frozen Food Packaging Market Outlook, By Cartons (2023–2034) (\$MN)
Table 7 Global Frozen Food Packaging Market Outlook, By Trays (2023–2034) (\$MN)
Table 8 Global Frozen Food Packaging Market Outlook, By Containers (2023–2034) (\$MN)
Table 9 Global Frozen Food Packaging Market Outlook, By Films and Wraps (2023–2034) (\$MN)
Table 10 Global Frozen Food Packaging Market Outlook, By Other Packaging Types (2023–2034) (\$MN)
Table 11 Global Frozen Food Packaging Market Outlook, By Material (2023–2034) (\$MN)
Table 12 Global Frozen Food Packaging Market Outlook, By Plastic (2023–2034) (\$MN)
Table 13 Global Frozen Food Packaging Market Outlook, By Paper and Paperboard (2023–2034) (\$MN)
Table 14 Global Frozen Food Packaging Market Outlook, By Metal (2023–2034) (\$MN)
Table 15 Global Frozen Food Packaging Market Outlook, By Glass (2023–2034) (\$MN)
Table 16 Global Frozen Food Packaging Market Outlook, By Bio-based Materials (2023–2034) (\$MN)
Table 17 Global Frozen Food Packaging Market Outlook, By Food Type (2023–2034) (\$MN)
Table 18 Global Frozen Food Packaging Market Outlook, By Frozen Meat (2023–2034) (\$MN)
Table 19 Global Frozen Food Packaging Market Outlook, By Frozen Seafood (2023–2034) (\$MN)
Table 20 Global Frozen Food Packaging Market Outlook, By Frozen Fruits and Vegetables (2023–2034) (\$MN)
Table 21 Global Frozen Food Packaging Market Outlook, By Frozen Bakery Products (2023–2034) (\$MN)
Table 22 Global Frozen Food Packaging Market Outlook, By Frozen Ready Meals

(2023–2034) (\$MN)

Table 23 Global Frozen Food Packaging Market Outlook, By Frozen Dairy Products

(2023–2034) (\$MN)

Table 24 Global Frozen Food Packaging Market Outlook, By Frozen Desserts

(2023–2034) (\$MN)

Table 25 Global Frozen Food Packaging Market Outlook, By Other Food Types

(2023–2034) (\$MN)

Table 26 Global Frozen Food Packaging Market Outlook, By Packaging Format

(2023–2034) (\$MN)

Table 27 Global Frozen Food Packaging Market Outlook, By Flexible Packaging

(2023–2034) (\$MN)

Table 28 Global Frozen Food Packaging Market Outlook, By Rigid Packaging

(2023–2034) (\$MN)

Table 29 Global Frozen Food Packaging Market Outlook, By Semi-Rigid Packaging

(2023–2034) (\$MN)

Table 30 Global Frozen Food Packaging Market Outlook, By Distribution Channel

(2023–2034) (\$MN)

Table 31 Global Frozen Food Packaging Market Outlook, By Retail (2023–2034) (\$MN)

Table 32 Global Frozen Food Packaging Market Outlook, By Foodservice (2023–2034) (\$MN)

Table 33 Global Frozen Food Packaging Market Outlook, By E-commerce (2023–2034) (\$MN)

Table 34 Global Frozen Food Packaging Market Outlook, By Wholesale (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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