

High-Barrier Films for Pharma & Food Market Forecasts to 2032 – Global Analysis By Film Type (Metallized Films, Transparent Barrier Films, Co- Extruded Multilayer Films, Biodegradable Barrier Films and Other Film Types), Material, Application and By Geography

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Abstracts

According to Statistics MRC, the Global High-Barrier Films for Pharma & Food Market is accounted for \$14.2 billion in 2025 and is expected to reach \$24.4 billion by 2032 growing at a CAGR of 8% during the forecast period. High-barrier films for pharma and food are specialized multilayer packaging materials designed to protect products from oxygen, moisture, light, chemicals, and microbial contamination. These films use combinations of polymers, coatings, and functional layers such as EVOH, aluminum oxide, or PVDC to create strong protective barriers that extend shelf life and maintain product safety, stability, and freshness. In pharmaceuticals, they prevent degradation of sensitive drugs, while in food applications they preserve flavor, aroma, and nutritional value. High-barrier films are essential for ensuring product integrity during storage, transportation, and handling, especially for items requiring stringent protection and long shelf life.

Market Dynamics:

Driver:

Rising demand for extended product shelf-life

Consumers and manufacturers are increasingly seeking packaging solutions that

preserve freshness, potency, and nutritional value for longer durations. High-barrier films provide superior protection against oxygen, moisture, and light, directly enhancing product stability. This capability is critical for pharmaceuticals, dairy, meat, and ready-to-eat meals where shelf-life extension is essential. Retailers benefit from reduced spoilage and longer distribution timelines, reinforcing adoption. Growing urbanization and busy lifestyles further amplify demand for convenience packaging with extended shelf stability.

Restraint:

High material and production costs

Advanced barrier films require specialized polymers, coatings, and multi-layer structures, which increase manufacturing expenses. Small and medium-sized packaging firms often struggle to absorb these costs, limiting adoption. Price-sensitive markets in developing regions are particularly affected, slowing penetration of premium packaging solutions. Complex production processes and stringent quality standards add to the financial burden. Competitive pressure from conventional packaging alternatives further challenges cost-intensive barrier films.

Opportunity:

Increasing preference for safe food storage

Consumers are prioritizing packaging that ensures hygiene, contamination prevention, and freshness retention. High-barrier films provide tamper resistance and superior sealing properties, directly addressing safety concerns. Rising demand for packaged foods, pharmaceuticals, and nutraceuticals reinforces adoption of advanced barrier solutions. Manufacturers are innovating with recyclable and bio-based films to combine safety with sustainability. Regulatory frameworks promoting food safety standards further accelerate adoption.

Threat:

Limited sustainability of conventional barrier films

Many high-barrier films rely on petroleum-based polymers and multi-layer laminates that are difficult to recycle. Growing consumer and regulatory pressure for eco-friendly packaging challenges the credibility of conventional solutions. Sustainability concerns

also discourage investment in non-recyclable materials, slowing innovation pipelines. Competitors offering bio-based and compostable alternatives create additional pressure on traditional films. Without stronger material innovations, conventional barrier films risk being phased out in favor of greener options. Consequently, limited sustainability remains a critical threat to market credibility and expansion.

Covid-19 Impact:

The COVID-19 pandemic had a mixed impact on the High-Barrier Films for Pharma & Food market. Supply chain disruptions affected raw material availability and delayed production schedules, slowing adoption in several regions. Economic uncertainty reduced investment in premium packaging solutions during the crisis. However, heightened consumer awareness of food safety and hygiene drove demand for protective packaging. Pharmaceutical companies also accelerated adoption of barrier films to ensure drug stability and secure distribution. Online food delivery and e-commerce growth further reinforced demand for advanced packaging formats.

The polyethylene terephthalate (PET) segment is expected to be the largest during the forecast period

The polyethylene terephthalate (PET) segment is expected to account for the largest market share during the forecast period driven by its versatility and strong barrier properties. PET films provide excellent resistance to oxygen and moisture, making them widely used in food and pharmaceutical packaging. Their compatibility with multi-layer structures reinforces adoption across diverse applications. Rising demand for extended shelf-life packaging aligns directly with the benefits of PET materials. The segment benefits from established supply chains and widespread availability, strengthening its dominance. Manufacturers are innovating with recyclable PET films to meet sustainability goals.

The ready-to-eat meals segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the ready-to-eat meals segment is predicted to witness the highest growth rate due to strong demand for convenience packaging. High-barrier films provide superior sealing and protection, ensuring freshness and safety for ready-to-eat products. Rising urbanization and busy lifestyles are accelerating adoption of packaged meals. Manufacturers are innovating with recyclable and bio-based films to meet sustainability requirements. The segment benefits from strong growth in e-commerce

and food delivery services, where secure packaging is critical. Advances in barrier technologies are further enhancing performance and consumer appeal.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share driven by strong consumer awareness of food safety and advanced packaging infrastructure. The region benefits from widespread adoption of high-barrier films in both food and pharmaceutical sectors. Consumers in the United States and Canada are increasingly demanding eco-friendly and high-performance packaging solutions. Regulatory frameworks promoting food safety and sustainability further reinforce adoption. The presence of leading packaging firms and continuous innovation strengthens regional leadership. Growth in convenience foods and pharmaceuticals accelerates demand for advanced barrier films.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR by rising packaged food consumption. Countries such as China, India, and Japan are witnessing strong demand for high-barrier films in food and pharma applications. Expanding middle-class populations and increasing disposable incomes support premium product adoption. Government initiatives promoting food safety and sustainable packaging further accelerate adoption. Local manufacturers are investing in advanced barrier technologies to meet growing demand. E-commerce platforms are making packaged foods more accessible across diverse markets.

Key players in the market

Some of the key players in High-Barrier Films for Pharma & Food Market include Amcor, Sealed Air Corporation, Mondi Group, Huhtamaki, Tetra Pak, Sonoco Products Company, WestRock, Stora Enso, UPM-Kymmene Corporation, BASF SE, Dow Inc., DuPont de Nemours Inc., Toray Industries, Mitsubishi Chemical Group and Berry Global Group.

Key Developments:

In February 2024, Sealed Air launched a new high-barrier shrink film, CRYOVAC® Barrier Foam, designed for fresh food packaging. This innovation provides exceptional oxygen and moisture barriers to extend shelf life, alongside using foam technology to

reduce plastic usage by up to 30%, addressing key customer demands for performance and sustainability in the food sector simultaneously.

In May 2024, Mondi partnered with SUDPACK to develop a new high-barrier recyclable polyolefin film packaging solution for the food industry. This collaboration combines Mondi's expertise in paper-based solutions with SUDPACK's specialty in high-performance films, aiming to create a fully recyclable alternative to multi-layer composites for sensitive food products, aligning with circular economy goals and meeting stringent shelf-life requirements.

Film Types Covered:

Metallized Films

Transparent Barrier Films

Co-Extruded Multilayer Films

Biodegradable Barrier Films

Other Film Types

Materials Covered:

Polyethylene (PE)

Polypropylene (PP)

Polyethylene Terephthalate (PET)

Ethylene Vinyl Alcohol (EVOH)

Polyvinylidene Chloride (PVDC)

Other Materials

Applications Covered:

Food Packaging

Dairy & Cheese

Meat, Poultry & Seafood

Bakery & Confectionery

Ready-to-Eat Meals

Beverages

Pharmaceutical Packaging

Blister Packs

Sachets & Pouches

Sterile Medical Packaging

Other Applications

Regions Covered:

North America

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

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:

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

2 PREFACE

- 2.1 Abstract
- 2.2 Stake Holders
- 2.3 Research Scope
- 2.4 Research Methodology
 - 2.4.1 Data Mining
 - 2.4.2 Data Analysis
 - 2.4.3 Data Validation
 - 2.4.4 Research Approach
- 2.5 Research Sources
 - 2.5.1 Primary Research Sources
 - 2.5.2 Secondary Research Sources
 - 2.5.3 Assumptions

3 MARKET TREND ANALYSIS

- 3.1 Introduction
- 3.2 Drivers
- 3.3 Restraints
- 3.4 Opportunities
- 3.5 Threats
- 3.6 Application Analysis
- 3.7 Emerging Markets
- 3.8 Impact of Covid-19

4 PORTERS FIVE FORCE ANALYSIS

- 4.1 Bargaining power of suppliers
- 4.2 Bargaining power of buyers
- 4.3 Threat of substitutes
- 4.4 Threat of new entrants
- 4.5 Competitive rivalry

5 GLOBAL HIGH-BARRIER FILMS FOR PHARMA & FOOD MARKET, BY FILM

High-Barrier Films for Pharma & Food Market Forecasts to 2032 – Global Analysis By Film Type (Metallized Films...

TYPE

- 5.1 Introduction
- 5.2 Metallized Films
- 5.3 Transparent Barrier Films
- 5.4 Co-Extruded Multilayer Films
- 5.5 Biodegradable Barrier Films
- 5.6 Other Film Types

6 GLOBAL HIGH-BARRIER FILMS FOR PHARMA & FOOD MARKET, BY MATERIAL

- 6.1 Introduction
- 6.2 Polyethylene (PE)
- 6.3 Polypropylene (PP)
- 6.4 Polyethylene Terephthalate (PET)
- 6.5 Ethylene Vinyl Alcohol (EVOH)
- 6.6 Polyvinylidene Chloride (PVDC)
- 6.7 Other Materials

7 GLOBAL HIGH-BARRIER FILMS FOR PHARMA & FOOD MARKET, BY APPLICATION

- 7.1 Introduction
- 7.2 Food Packaging
- 7.3 Dairy & Cheese
- 7.4 Meat, Poultry & Seafood
- 7.5 Bakery & Confectionery
- 7.6 Ready-to-Eat Meals
- 7.7 Beverages
- 7.8 Pharmaceutical Packaging
- 7.9 Blister Packs
- 7.10 Sachets & Pouches
- 7.11 Sterile Medical Packaging
- 7.12 Other Applications

8 GLOBAL HIGH-BARRIER FILMS FOR PHARMA & FOOD MARKET, BY GEOGRAPHY

- 8.1 Introduction
- 8.2 North America
 - 8.2.1 US
 - 8.2.2 Canada
 - 8.2.3 Mexico
- 8.3 Europe
 - 8.3.1 Germany
 - 8.3.2 UK
 - 8.3.3 Italy
 - 8.3.4 France
 - 8.3.5 Spain
 - 8.3.6 Rest of Europe
- 8.4 Asia Pacific
 - 8.4.1 Japan
 - 8.4.2 China
 - 8.4.3 India
 - 8.4.4 Australia
 - 8.4.5 New Zealand
 - 8.4.6 South Korea
 - 8.4.7 Rest of Asia Pacific
- 8.5 South America
 - 8.5.1 Argentina
 - 8.5.2 Brazil
 - 8.5.3 Chile
 - 8.5.4 Rest of South America
- 8.6 Middle East & Africa
 - 8.6.1 Saudi Arabia
 - 8.6.2 UAE
 - 8.6.3 Qatar
 - 8.6.4 South Africa
 - 8.6.5 Rest of Middle East & Africa

9 KEY DEVELOPMENTS

- 9.1 Agreements, Partnerships, Collaborations and Joint Ventures
- 9.2 Acquisitions & Mergers
- 9.3 New Product Launch
- 9.4 Expansions
- 9.5 Other Key Strategies

10 COMPANY PROFILING

- 10.1 Amcor
- 10.2 Sealed Air Corporation
- 10.3 Mondi Group
- 10.4 Huhtamaki
- 10.5 Tetra Pak
- 10.6 Sonoco Products Company
- 10.7 WestRock
- 10.8 Stora Enso
- 10.9 UPM-Kymmene Corporation
- 10.10 BASF SE
- 10.11 Dow Inc.
- 10.12 DuPont de Nemours Inc.
- 10.13 Toray Industries
- 10.14 Mitsubishi Chemical Group
- 10.15 Berry Global Group

List Of Tables

LIST OF TABLES

Table 1 Global High-Barrier Films for Pharma & Food Market Outlook, By Region (2024-2032) (\$MN)

Table 2 Global High-Barrier Films for Pharma & Food Market Outlook, By Film Type (2024-2032) (\$MN)

Table 3 Global High-Barrier Films for Pharma & Food Market Outlook, By Metallized Films (2024-2032) (\$MN)

Table 4 Global High-Barrier Films for Pharma & Food Market Outlook, By Transparent Barrier Films (2024-2032) (\$MN)

Table 5 Global High-Barrier Films for Pharma & Food Market Outlook, By Co-Extruded Multilayer Films (2024-2032) (\$MN)

Table 6 Global High-Barrier Films for Pharma & Food Market Outlook, By Biodegradable Barrier Films (2024-2032) (\$MN)

Table 7 Global High-Barrier Films for Pharma & Food Market Outlook, By Other Film Types (2024-2032) (\$MN)

Table 8 Global High-Barrier Films for Pharma & Food Market Outlook, By Material (2024-2032) (\$MN)

Table 9 Global High-Barrier Films for Pharma & Food Market Outlook, By Polyethylene (PE) (2024-2032) (\$MN)

Table 10 Global High-Barrier Films for Pharma & Food Market Outlook, By Polypropylene (PP) (2024-2032) (\$MN)

Table 11 Global High-Barrier Films for Pharma & Food Market Outlook, By Polyethylene Terephthalate (PET) (2024-2032) (\$MN)

Table 12 Global High-Barrier Films for Pharma & Food Market Outlook, By Ethylene Vinyl Alcohol (EVOH) (2024-2032) (\$MN)

Table 13 Global High-Barrier Films for Pharma & Food Market Outlook, By Polyvinylidene Chloride (PVDC) (2024-2032) (\$MN)

Table 14 Global High-Barrier Films for Pharma & Food Market Outlook, By Other Materials (2024-2032) (\$MN)

Table 15 Global High-Barrier Films for Pharma & Food Market Outlook, By Application (2024-2032) (\$MN)

Table 16 Global High-Barrier Films for Pharma & Food Market Outlook, By Food Packaging (2024-2032) (\$MN)

Table 17 Global High-Barrier Films for Pharma & Food Market Outlook, By Dairy & Cheese (2024-2032) (\$MN)

Table 18 Global High-Barrier Films for Pharma & Food Market Outlook, By Meat,

Poultry & Seafood (2024-2032) (\$MN)

Table 19 Global High-Barrier Films for Pharma & Food Market Outlook, By Bakery & Confectionery (2024-2032) (\$MN)

Table 20 Global High-Barrier Films for Pharma & Food Market Outlook, By Ready-to-Eat Meals (2024-2032) (\$MN)

Table 21 Global High-Barrier Films for Pharma & Food Market Outlook, By Beverages (2024-2032) (\$MN)

Table 22 Global High-Barrier Films for Pharma & Food Market Outlook, By Pharmaceutical Packaging (2024-2032) (\$MN)

Table 23 Global High-Barrier Films for Pharma & Food Market Outlook, By Blister Packs (2024-2032) (\$MN)

Table 24 Global High-Barrier Films for Pharma & Food Market Outlook, By Sachets & Pouches (2024-2032) (\$MN)

Table 25 Global High-Barrier Films for Pharma & Food Market Outlook, By Sterile Medical Packaging (2024-2032) (\$MN)

Table 26 Global High-Barrier Films for Pharma & Food Market Outlook, By Other Applications (2024-2032) (\$MN)

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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