

High Barrier Packaging Films Market Forecasts to 2034 – Global Analysis By Material Type (Plastic, Non-Plastic and Other Material Types), By Packaging Type (Pouches and Bags, Films and Other Packaging Types), Technology, Application and By Geography

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Abstracts

According to Statistics MRC, the Global High Barrier Packaging Films Market is accounted for \$30.34 billion in 2026 and is expected to reach \$67.42 billion by 2034 growing at a CAGR of 10.7% during the forecast period. High-Barrier Packaging Films are advanced materials designed to provide an effective barrier against external elements such as moisture, oxygen, and light, preserving the freshness and quality of packaged products. These films, often multi-layered with specialized coatings, enhance shelf life, prevent contamination, and maintain the integrity of sensitive goods, making them crucial in industries like food, pharmaceuticals, and electronics.

According to National Center for Biotechnology Information (NCBI), the entire amount of plastic is produced. Plastic is used for packaging 42 percent of the time, construction 19 percent of the time, and the textile sector 17 percent.

Market Dynamics:

Driver:

Growing preference for flexible packaging

The growing preference for flexible packaging is a significant driver in the high-barrier packaging film market due to its numerous advantages. Flexible packaging offers versatility, lightweight materials, and cost-effectiveness. Consumers and industries

increasingly favor this packaging format for its convenience and adaptability, fostering the demand for high-barrier films. These films ensure extended shelf life, protect against external factors, and accommodate the evolving trends in sustainable and convenient packaging solutions, thus driving their adoption across various sectors.

Restraint:

Stringent regulations and standards

Stringent regulations and standards pose a restraint in the high-barrier packaging film market, as compliance requires significant investments in research, testing, and manufacturing processes. Adhering to strict guidelines regarding material safety, environmental impact, and food contact can increase production costs and limit flexibility in product development, which hinders market growth.

Opportunity:

Expanding food and pharmaceutical industries

The expanding food and pharmaceutical industries present a significant opportunity in the high-barrier packaging film market. As these industries grow, there is an increased demand for packaging solutions that ensure product freshness, extend shelf life, and comply with stringent safety regulations. High-barrier packaging films, with their ability to protect against moisture, oxygen, and other external factors, become essential components for preserving the integrity and quality of food and pharmaceutical products, thereby meeting the rising requirements of these burgeoning industries.

Threat:

Fluctuating raw material prices

The industry relies on specialized materials such as high-performance polymers and coatings. Unpredictable shifts in the prices of these raw materials, influenced by factors like geopolitical events, supply chain disruptions, or global economic conditions, can lead to increased production costs. As a result, manufacturers may struggle to maintain profit margins and competitiveness. Moreover, price volatility can hinder long-term planning and investment strategies, impacting the overall stability of the market and potentially limiting innovations and advancements in high-barrier packaging technologies.

Covid-19 Impact:

The COVID-19 pandemic profoundly impacted the high-barrier packaging film market as it disrupted global supply chains, manufacturing processes, and consumer demand. Lockdowns, logistical challenges, and economic uncertainties led to a decline in production and consumption. However, the industry showcased resilience by adapting to changing dynamics, focusing on essential sectors, and accelerating innovations in antimicrobial and sustainable packaging solutions, thereby navigating the challenges posed by the pandemic.

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

The plastic segment is anticipated to dominate the high-barrier packaging film market during the forecast period due to its widespread use in various industries. Plastic films offer excellent barrier properties against moisture, oxygen, and light, ensuring the preservation of sensitive products. Additionally, advancements in polymer technology have led to the development of high-performance plastic films, enhancing their suitability for diverse applications. The versatility, cost-effectiveness, and customizable nature of plastic films contribute to their sustained prominence in the market.

The pharmaceuticals & medical segment is expected to have the highest CAGR during the forecast period

The pharmaceuticals and medical segments are anticipated to experience the highest growth in the high-barrier packaging film market during the forecast period. This growth is driven by the increasing demand for advanced packaging solutions that provide protection against external elements, ensuring the integrity and safety of pharmaceutical products. Additionally, stringent regulatory requirements and a growing emphasis on extending the shelf life of medical supplies further contribute to the elevated demand for high-barrier packaging films in this sector.

Region with largest share:

North America is positioned to dominate the high barrier packaging films market due to factors such as a robust healthcare sector, stringent packaging regulations, and the region's focus on sustainable packaging. The growing demand for packaged food and pharmaceuticals, coupled with technological advancements, contributes to the market's growth. Additionally, increased consumer awareness regarding food safety and

environmental concerns is driving the adoption of high-barrier packaging films in various applications, further solidifying North America's market dominance.

Region with highest CAGR:

The Asia Pacific region anticipates rapid growth in the High Barrier Packaging Films market owing to expanding food and beverage and pharmaceutical industries. With rising populations, urbanization, and changing lifestyles, there is an increased demand for packaged goods. Additionally, growing environmental concerns are driving the adoption of sustainable and high-barrier packaging solutions. The region's economic development, coupled with a focus on technological advancements, positions Asia Pacific as a key player in the high-barrier packaging film market.

Key players in the market

Some of the key players in High Barrier Packaging Films Market include Amcor Limited, Berry Global Inc., Cosmo Films Ltd., Coveris Holdings S.A., DuPont, Huhtamäki Oyj, Jindal Poly Films Ltd., Klockner Pentaplast Group, Mondi Group, Plastissimo Film Co., Ltd., Schur Flexibles Group, Sealed Air Corporation, Taghleef Industries, Toppan Holdings Inc, Toray Plastics (America), Inc., Uflex Ltd. and Winpak Ltd.

Key Developments:

In October 2023, Cosmo Films a global leader in speciality films for packaging, labelling, synthetic paper, and lamination applications announces the launch of its new business division - Cosmo Plastech. This strategic move aligns perfectly with the company's vision of offering a diverse range of packaging solutions to its valued partners for a wide array of FMCG products, providing enhanced supply chain efficiency.

In August 2023, Toppan, Mitsui Chemicals Tohcello, and Mitsui Chemicals have announced the launch of pilot testing this month for horizontally recycling printed BOPP film back into new flexible packaging film. Through this joint pilot testing initiative, the three companies aim to establish technologies and operational infrastructure for the horizontal recycling of flexible packaging materials, as well as leverage network growth in the flexible packaging materials industry to advance and expand the horizontal recycling of flexible packaging film.

Material Types Covered:

Plastic

Non-Plastic

Other Material Types

Packaging Types Covered:

Pouches and Bags

Films

Laminated Tubes

Lids

Wraps

Other Packaging Types

Technologies Covered:

Multi-Layer Films

Melamine-Based and Sustainable Barrier Coatings

Polymer Nanocomposite

Other Technologies

Applications Covered:

Food and Beverages

Pharmaceuticals & Medical

Personal Care & Cosmetics

Electronics

Chemicals

Industrial Products

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 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

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 Technology Analysis
- 3.7 Application Analysis
- 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 PACKAGING FILMS MARKET, BY MATERIAL TYPE

High Barrier Packaging Films Market Forecasts to 2034 – Global Analysis By Material Type (Plastic, Non-Plastic...

5.1 Introduction

5.2 Plastic

5.2.1 Biodegradable Plastics

5.2.2 Ethylene Vinyl Alcohol (EVOH)

5.2.3 Polyamide (Nylon)

5.2.4 Polyethylene (PE)

5.2.5 Polyethylene Naphthalate (PEN)

5.2.6 Polyethylene Terephthalate (PET)

5.2.7 Polypropylene (PP)

5.2.8 Polyvinylidene Chloride (PVDC)

5.3 Non-Plastic

5.3.1 Aluminium

5.3.2 Paper-Based

5.4 Other Material Types

6 GLOBAL HIGH BARRIER PACKAGING FILMS MARKET, BY PACKAGING TYPE

6.1 Introduction

6.2 Pouches and Bags

6.3 Films

6.4 Laminated Tubes

6.5 Lids

6.6 Wraps

6.7 Other Packaging Types

7 GLOBAL HIGH BARRIER PACKAGING FILMS MARKET, BY TECHNOLOGY

7.1 Introduction

7.2 Multi-Layer Films

7.3 Melamine-Based and Sustainable Barrier Coatings

7.4 Polymer Nanocomposite

7.5 Other Technologies

8 GLOBAL HIGH BARRIER PACKAGING FILMS MARKET, BY APPLICATION

8.1 Introduction

8.2 Food and Beverages

8.2.1 Bakery & Confectionery

- 8.2.2 Beverages
- 8.2.3 Dairy Products
- 8.2.4 Fresh Produce
- 8.2.5 Meat & Poultry
- 8.2.6 Processed Food
- 8.3 Pharmaceuticals & Medical
- 8.4 Personal Care & Cosmetics
- 8.5 Electronics
- 8.6 Chemicals
- 8.7 Industrial Products
- 8.8 Other Applications

9 GLOBAL HIGH BARRIER PACKAGING FILMS MARKET, BY GEOGRAPHY

- 9.1 Introduction
- 9.2 North America
 - 9.2.1 US
 - 9.2.2 Canada
 - 9.2.3 Mexico
- 9.3 Europe
 - 9.3.1 Germany
 - 9.3.2 UK
 - 9.3.3 Italy
 - 9.3.4 France
 - 9.3.5 Spain
 - 9.3.6 Rest of Europe
- 9.4 Asia Pacific
 - 9.4.1 Japan
 - 9.4.2 China
 - 9.4.3 India
 - 9.4.4 Australia
 - 9.4.5 New Zealand
 - 9.4.6 South Korea
 - 9.4.7 Rest of Asia Pacific
- 9.5 South America
 - 9.5.1 Argentina
 - 9.5.2 Brazil
 - 9.5.3 Chile
 - 9.5.4 Rest of South America

9.6 Middle East & Africa

- 9.6.1 Saudi Arabia
- 9.6.2 UAE
- 9.6.3 Qatar
- 9.6.4 South Africa
- 9.6.5 Rest of Middle East & Africa

10 KEY DEVELOPMENTS

- 10.1 Agreements, Partnerships, Collaborations and Joint Ventures
- 10.2 Acquisitions & Mergers
- 10.3 New Product Launch
- 10.4 Expansions
- 10.5 Other Key Strategies

11 COMPANY PROFILING

- 11.1 Amcor Limited
- 11.2 Berry Global Inc.
- 11.3 Cosmo Films Ltd.
- 11.4 Coveris Holdings S.A.
- 11.5 DuPont
- 11.6 Huhtamäki Oyj
- 11.7 Jindal Poly Films Ltd.
- 11.8 Klockner Pentaplast Group
- 11.9 Mondi Group
- 11.10 Plastissimo Film Co., Ltd.
- 11.11 Schur Flexibles Group
- 11.12 Sealed Air Corporation
- 11.13 Taghleef Industries
- 11.14 Toppan Holdings Inc
- 11.15 Toray Plastics (America), Inc.
- 11.16 Uflex Ltd.
- 11.17 Winpak Ltd.

List Of Tables

LIST OF TABLES

Table 1 Global High Barrier Packaging Films Market Outlook, By Region (2023-2034) (\$MN)

Table 2 Global High Barrier Packaging Films Market Outlook, By Material Type (2023-2034) (\$MN)

Table 3 Global High Barrier Packaging Films Market Outlook, By Plastic (2023-2034) (\$MN)

Table 4 Global High Barrier Packaging Films Market Outlook, By Biodegradable Plastics (2023-2034) (\$MN)

Table 5 Global High Barrier Packaging Films Market Outlook, By Ethylene Vinyl Alcohol (EVOH) (2023-2034) (\$MN)

Table 6 Global High Barrier Packaging Films Market Outlook, By Polyamide (Nylon) (2023-2034) (\$MN)

Table 7 Global High Barrier Packaging Films Market Outlook, By Polyethylene (PE) (2023-2034) (\$MN)

Table 8 Global High Barrier Packaging Films Market Outlook, By Polyethylene Naphthalate (PEN) (2023-2034) (\$MN)

Table 9 Global High Barrier Packaging Films Market Outlook, By Polyethylene Terephthalate (PET) (2023-2034) (\$MN)

Table 10 Global High Barrier Packaging Films Market Outlook, By Polypropylene (PP) (2023-2034) (\$MN)

Table 11 Global High Barrier Packaging Films Market Outlook, By Polyvinylidene Chloride (PVDC) (2023-2034) (\$MN)

Table 12 Global High Barrier Packaging Films Market Outlook, By Non-Plastic (2023-2034) (\$MN)

Table 13 Global High Barrier Packaging Films Market Outlook, By Aluminium (2023-2034) (\$MN)

Table 14 Global High Barrier Packaging Films Market Outlook, By Paper-Based (2023-2034) (\$MN)

Table 15 Global High Barrier Packaging Films Market Outlook, By Other Material Types (2023-2034) (\$MN)

Table 16 Global High Barrier Packaging Films Market Outlook, By Packaging Type (2023-2034) (\$MN)

Table 17 Global High Barrier Packaging Films Market Outlook, By Pouches and Bags (2023-2034) (\$MN)

Table 18 Global High Barrier Packaging Films Market Outlook, By Films (2023-2034)

(\$MN)

Table 19 Global High Barrier Packaging Films Market Outlook, By Laminated Tubes (2023-2034) (\$MN)

Table 20 Global High Barrier Packaging Films Market Outlook, By Lids (2023-2034) (\$MN)

Table 21 Global High Barrier Packaging Films Market Outlook, By Wraps (2023-2034) (\$MN)

Table 22 Global High Barrier Packaging Films Market Outlook, By Other Packaging Types (2023-2034) (\$MN)

Table 23 Global High Barrier Packaging Films Market Outlook, By Technology (2023-2034) (\$MN)

Table 24 Global High Barrier Packaging Films Market Outlook, By Multi-Layer Films (2023-2034) (\$MN)

Table 25 Global High Barrier Packaging Films Market Outlook, By Melamine-Based and Sustainable Barrier Coatings (2023-2034) (\$MN)

Table 26 Global High Barrier Packaging Films Market Outlook, By Polymer Nanocomposite (2023-2034) (\$MN)

Table 27 Global High Barrier Packaging Films Market Outlook, By Other Technologies (2023-2034) (\$MN)

Table 28 Global High Barrier Packaging Films Market Outlook, By Application (2023-2034) (\$MN)

Table 29 Global High Barrier Packaging Films Market Outlook, By Food and Beverages (2023-2034) (\$MN)

Table 30 Global High Barrier Packaging Films Market Outlook, By Bakery & Confectionery (2023-2034) (\$MN)

Table 31 Global High Barrier Packaging Films Market Outlook, By Beverages (2023-2034) (\$MN)

Table 32 Global High Barrier Packaging Films Market Outlook, By Dairy Products (2023-2034) (\$MN)

Table 33 Global High Barrier Packaging Films Market Outlook, By Fresh Produce (2023-2034) (\$MN)

Table 34 Global High Barrier Packaging Films Market Outlook, By Meat & Poultry (2023-2034) (\$MN)

Table 35 Global High Barrier Packaging Films Market Outlook, By Processed Food (2023-2034) (\$MN)

Table 36 Global High Barrier Packaging Films Market Outlook, By Pharmaceuticals & Medical (2023-2034) (\$MN)

Table 37 Global High Barrier Packaging Films Market Outlook, By Personal Care & Cosmetics (2023-2034) (\$MN)

Table 38 Global High Barrier Packaging Films Market Outlook, By Electronics
(2023-2034) (\$MN)

Table 39 Global High Barrier Packaging Films Market Outlook, By Chemicals
(2023-2034) (\$MN)

Table 40 Global High Barrier Packaging Films Market Outlook, By Industrial Products
(2023-2034) (\$MN)

Table 41 Global High Barrier Packaging Films Market Outlook, By Other Applications
(2023-2034) (\$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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