

# **High-Barrier Packaging Market Forecasts to 2034 – Global Analysis By Material Type (Ethylene Vinyl Alcohol, Polyvinylidene Chloride, Polyamide, Polyethylene (PE), Polyethylene Terephthalate (PET), Aluminum Foil, Metalized Films, and Biopolymers), Barrier Type, Packaging Format, Technology, Application, End User and By Geography**

<https://marketpublishers.com/r/H99168DB1164EN.html>

Date: May 2026

Pages: 200

Price: US\$ 4,150.00 (Single User License)

ID: H99168DB1164EN

## **Abstracts**

According to Statistics MRC, the Global High-Barrier Packaging Market is accounted for \$19.8 billion in 2026 and is expected to reach \$27.5 billion by 2034, growing at a CAGR of 4.2% during the forecast period. High-barrier packaging refers to materials designed to significantly limit the transmission of oxygen, moisture, light, and volatile aromas, thereby extending product shelf life. This technology utilizes specialized materials such as Ethylene Vinyl Alcohol, Polyvinylidene Chloride, aluminum foil, and advanced coatings. It is essential for preserving sensitive products in food, pharmaceuticals, and electronics. By maintaining product integrity and reducing food waste, high-barrier packaging supports sustainability goals, enhances brand value, and ensures regulatory compliance across global supply chains.

### **Market Dynamics:**

#### **Driver:**

Growing demand for extended shelf life in food and beverage industry

Consumers increasingly prefer packaged foods with longer freshness duration without relying on artificial preservatives. High-barrier packaging effectively blocks oxygen and

moisture ingress, preventing spoilage and maintaining nutritional value. Retailers and food manufacturers benefit from reduced inventory waste and expanded distribution reach, especially for perishable items like dairy, meat, and ready-to-eat meals. The rise of organized retail and e-commerce grocery platforms further accelerates adoption, as products must withstand longer transit and storage times. This need for extended product viability directly propels high-barrier packaging market growth.

**Restraint:**

High material and production costs compared to conventional packaging

Manufacturing high-barrier packaging involves multilayer structures, specialized resins, and advanced processing techniques like co-extrusion and lamination. Materials such as ethylene vinyl alcohol and polyvinylidene chloride are significantly more expensive than standard polyethylene or paper. Small and medium-sized enterprises often find these costs prohibitive, limiting their ability to switch from conventional packaging. Additionally, recycling complexities due to mixed material layers increase waste management expenses. Price-sensitive markets, particularly in developing regions, continue preferring cheaper alternatives despite inferior protection.

**Opportunity:**

Rapid expansion of pharmaceutical and medical device sectors

Biologics, vaccines, and sensitive medical devices require high-barrier blister packs, pouches, and bottles. The post-pandemic focus on healthcare infrastructure and personalized medicine drives innovation in tamper-evident and child-resistant high-barrier solutions. Additionally, aging populations in developed nations increase chronic disease management, boosting demand for prescription packaging. Regulatory bodies like the FDA and EMA mandate stringent quality standards, pushing pharmaceutical companies toward advanced barrier technologies. This healthcare sector growth presents substantial opportunities for high-barrier packaging manufacturers.

**Threat:**

Stringent environmental regulations and plastic waste concerns

High-barrier packaging often uses multilayer films combining different polymers, making

mechanical recycling extremely difficult. Governments worldwide, particularly the EU and Canada, are implementing single-use plastic bans and extended producer responsibility laws. Major brands have pledged to use recyclable or compostable packaging by 2025, threatening conventional multi-material barrier structures. Although biopolymers and recyclable barrier solutions are emerging, they currently lack the performance parity of traditional materials at comparable costs. Consumer backlash against plastic waste further pressures manufacturers.

### **Covid-19 Impact:**

The COVID-19 pandemic significantly boosted demand for high-barrier packaging due to increased home cooking, e-commerce deliveries, and pharmaceutical needs. Lockdowns accelerated frozen and shelf-stable food consumption, driving orders for barrier films and pouches. Vaccine distribution required ultra-cold-chain packaging with exceptional moisture and oxygen barriers, creating new application areas. However, supply chain disruptions and resin shortages caused price volatility and delayed deliveries. Labor shortages at converting facilities reduced production capacities temporarily. Post-pandemic, hygiene awareness remains elevated, sustaining demand for individually wrapped and tamper-evident packaging. The crisis highlighted packaging's critical role in public health and food security.

The films and wraps segment is expected to be the largest during the forecast period

The films and wraps segment is expected to account for the largest market share during the forecast period. This dominance stems from their versatility, lightweight nature, and compatibility with high-speed form-fill-seal equipment. Flexible barrier films are widely used for meat, cheese, snacks, and medical device packaging. Their ability to conform to product shapes reduces material waste while providing excellent oxygen and moisture protection. Ongoing developments in thinner yet stronger multilayer films further drive adoption across food and pharmaceutical industries.

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

Over the forecast period, the biopolymers segment is predicted to witness the highest growth rate. Driven by environmental regulations and consumer preference for sustainable packaging, bio-based barrier materials like PLA, PHA, and coated paper are gaining traction. Manufacturers are improving biopolymer barrier properties against oxygen and moisture through nanocomposite technologies and bio-coatings. Major

brands switching to compostable packaging for snacks and coffee pods further accelerates this segment. As fossil fuel concerns rise, biopolymers offer a renewable, lower-carbon alternative.

### **Region with largest share:**

During the forecast period, the North America region is expected to hold the largest market share, driven by stringent FDA food safety regulations and high processed food consumption. The presence of major packaging converters like Amcor, Sealed Air, and Berry Global strengthens the regional ecosystem. Additionally, advanced recycling infrastructure and early adoption of active and intelligent packaging technologies contribute to North America's dominant position.

### **Region with highest CAGR:**

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, fueled by rapid urbanization, expanding middle-class populations, and growth in organized retail across China and India. Local food manufacturers increasingly adopt barrier packaging to reduce spoilage in warm, humid climates. Government investments in cold chain infrastructure and pharmaceutical exports from India and Southeast Asia drive demand. Chinese and Southeast Asian packaging firms aggressively localize production of barrier films, lowering costs. As e-commerce grocery penetration rises, Asia Pacific becomes the fastest-growing market.

### **Key players in the market**

Some of the key players in High-Barrier Packaging Market include Amcor plc, Sealed Air Corporation, Mondi Group, Berry Global Group, Inc., Sonoco Products Company, Winpak Ltd., Toray Plastics, Inc., Toppan Printing Co., Ltd., Mitsubishi Chemical Corporation, DuPont Teijin Films, Kuraray Co., Ltd., Kureha Corporation, ProAmpac LLC, Coveris Holdings S.A., and Huhtamaki Oyj.

### **Key Developments:**

In April 2026, Sealed Air Corporation announced the completion of its previously announced acquisition by funds affiliated with CD&R. Sealed Air will remain headquartered in Charlotte, North Carolina, and will continue to operate under the Sealed Air name. CD&R is committed to supporting Sealed Air's growth across its Food and Protective businesses, building on the Company's legacy of delivering high-

performance materials, automated packaging equipment and world-class service.

In April 2026, Amcor has unveiled a new closure targeting applications such as mayonnaise, ketchup and sweet sauces. The 55 mm Flava Flip Top Closure 38/400 is a lightweighted upgrade compared to previous versions. The new generation of the 38/400 neck finish range is designed for circularity to help brand owners meet and exceed their sustainability goals.

#### Material Types Covered:

Ethylene Vinyl Alcohol

Polyvinylidene Chloride

Polyamide

Polyethylene (PE)

Polyethylene Terephthalate (PET)

Aluminum Foil

Metalized Films

Biopolymers

#### Barrier Types Covered:

Oxygen Barrier

Moisture Barrier

Light Barrier

Aroma and Flavor Barrier

Multi-Barrier

**Packaging Formats Covered:**

Films and Wraps

Pouches and Bags

Trays

Laminates and Lidding Films

Bottles and Containers

Cartons and Boxes

Other Packaging Formats

**Technologies Covered:**

Co-extrusion

Lamination

Coating

Metalization

Thin Film Deposition

Nanocomposite Barrier Technology

**Applications Covered:**

Food & Beverage

Pharmaceuticals & Medical Devices

Cosmetics & Personal Care

Industrial & Chemical Packaging

Electronics & Semiconductors

Pet Food

Other Applications

End Users Covered:

Food Manufacturers

Pharmaceutical Companies

Cosmetic Brands

Electronics OEMs

Contract Packaging Firms

Retail and Private Labels

Other End Users

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, 2029, 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 HIGH-BARRIER PACKAGING MARKET, BY MATERIAL TYPE**

- 5.1 Ethylene Vinyl Alcohol
- 5.2 Polyvinylidene Chloride
- 5.3 Polyamide
- 5.4 Polyethylene (PE)
- 5.5 Polyethylene Terephthalate (PET)
- 5.6 Aluminum Foil
- 5.7 Metalized Films
- 5.8 Biopolymers

## **6 GLOBAL HIGH-BARRIER PACKAGING MARKET, BY BARRIER TYPE**

- 6.1 Oxygen Barrier
- 6.2 Moisture Barrier
- 6.3 Light Barrier
- 6.4 Aroma and Flavor Barrier
- 6.5 Multi-Barrier

## **7 GLOBAL HIGH-BARRIER PACKAGING MARKET, BY PACKAGING FORMAT**

- 7.1 Films and Wraps
- 7.2 Pouches and Bags
- 7.3 Trays
- 7.4 Laminates and Lidding Films
- 7.5 Bottles and Containers
- 7.6 Cartons and Boxes
- 7.7 Other Packaging Formats

## **8 GLOBAL HIGH-BARRIER PACKAGING MARKET, BY TECHNOLOGY**

- 8.1 Co-extrusion
- 8.2 Lamination
- 8.3 Coating
- 8.4 Metalization

8.5 Thin Film Deposition

8.6 Nanocomposite Barrier Technology

## **9 GLOBAL HIGH-BARRIER PACKAGING MARKET, BY APPLICATION**

9.1 Food & Beverage

9.2 Pharmaceuticals & Medical Devices

9.3 Cosmetics & Personal Care

9.4 Industrial & Chemical Packaging

9.5 Electronics & Semiconductors

9.6 Pet Food

9.7 Other Applications

## **10 GLOBAL HIGH-BARRIER PACKAGING MARKET, BY END USER**

10.1 Food Manufacturers

10.2 Pharmaceutical Companies

10.3 Cosmetic Brands

10.4 Electronics OEMs

10.5 Contract Packaging Firms

10.6 Retail and Private Labels

10.7 Other End Users

## **11 GLOBAL HIGH-BARRIER PACKAGING MARKET, BY GEOGRAPHY**

11.1 North America

11.1.1 United States

11.1.2 Canada

11.1.3 Mexico

11.2 Europe

11.2.1 United Kingdom

11.2.2 Germany

11.2.3 France

11.2.4 Italy

11.2.5 Spain

11.2.6 Netherlands

11.2.7 Belgium

11.2.8 Sweden

11.2.9 Switzerland

- 11.2.10 Poland
- 11.2.11 Rest of Europe
- 11.3 Asia Pacific
  - 11.3.1 China
  - 11.3.2 Japan
  - 11.3.3 India
  - 11.3.4 South Korea
  - 11.3.5 Australia
  - 11.3.6 Indonesia
  - 11.3.7 Thailand
  - 11.3.8 Malaysia
  - 11.3.9 Singapore
  - 11.3.10 Vietnam
  - 11.3.11 Rest of Asia Pacific
- 11.4 South America
  - 11.4.1 Brazil
  - 11.4.2 Argentina
  - 11.4.3 Colombia
  - 11.4.4 Chile
  - 11.4.5 Peru
  - 11.4.6 Rest of South America
- 11.5 Rest of the World (RoW)
  - 11.5.1 Middle East
    - 11.5.1.1 Saudi Arabia
    - 11.5.1.2 United Arab Emirates
    - 11.5.1.3 Qatar
    - 11.5.1.4 Israel
    - 11.5.1.5 Rest of Middle East
  - 11.5.2 Africa
    - 11.5.2.1 South Africa
    - 11.5.2.2 Egypt
    - 11.5.2.3 Morocco
    - 11.5.2.4 Rest of Africa

## **12 STRATEGIC MARKET INTELLIGENCE**

- 12.1 Industry Value Network and Supply Chain Assessment
- 12.2 White-Space and Opportunity Mapping
- 12.3 Product Evolution and Market Life Cycle Analysis

12.4 Channel, Distributor, and Go-to-Market Assessment

## **13 INDUSTRY DEVELOPMENTS AND STRATEGIC INITIATIVES**

13.1 Mergers and Acquisitions

13.2 Partnerships, Alliances, and Joint Ventures

13.3 New Product Launches and Certifications

13.4 Capacity Expansion and Investments

13.5 Other Strategic Initiatives

## **14 COMPANY PROFILES**

14.1 Amcor plc

14.2 Sealed Air Corporation

14.3 Mondi Group

14.4 Berry Global Group, Inc.

14.5 Sonoco Products Company

14.6 Wipak Ltd.

14.7 Toray Plastics, Inc.

14.8 Toppan Printing Co., Ltd.

14.9 Mitsubishi Chemical Corporation

14.10 DuPont Teijin Films

14.11 Kuraray Co., Ltd.

14.12 Kureha Corporation

14.13 ProAmpac LLC

14.14 Coveris Holdings S.A.

14.15 Huhtamaki Oyj

## List Of Tables

### LIST OF TABLES

- Table 1 Global High-Barrier Packaging Market Outlook, By Region (2023-2034) (\$MN)
- Table 2 Global High-Barrier Packaging Market Outlook, By Material Type (2023-2034) (\$MN)
- Table 3 Global High-Barrier Packaging Market Outlook, By Ethylene Vinyl Alcohol (2023-2034) (\$MN)
- Table 4 Global High-Barrier Packaging Market Outlook, By Polyvinylidene Chloride (2023-2034) (\$MN)
- Table 5 Global High-Barrier Packaging Market Outlook, By Polyamide (2023-2034) (\$MN)
- Table 6 Global High-Barrier Packaging Market Outlook, By Polyethylene (PE) (2023-2034) (\$MN)
- Table 7 Global High-Barrier Packaging Market Outlook, By Polyethylene Terephthalate (PET) (2023-2034) (\$MN)
- Table 8 Global High-Barrier Packaging Market Outlook, By Aluminum Foil (2023-2034) (\$MN)
- Table 9 Global High-Barrier Packaging Market Outlook, By Metalized Films (2023-2034) (\$MN)
- Table 10 Global High-Barrier Packaging Market Outlook, By Biopolymers (2023-2034) (\$MN)
- Table 11 Global High-Barrier Packaging Market Outlook, By Barrier Type (2023-2034) (\$MN)
- Table 12 Global High-Barrier Packaging Market Outlook, By Oxygen Barrier (2023-2034) (\$MN)
- Table 13 Global High-Barrier Packaging Market Outlook, By Moisture Barrier (2023-2034) (\$MN)
- Table 14 Global High-Barrier Packaging Market Outlook, By Light Barrier (2023-2034) (\$MN)
- Table 15 Global High-Barrier Packaging Market Outlook, By Aroma and Flavor Barrier (2023-2034) (\$MN)
- Table 16 Global High-Barrier Packaging Market Outlook, By Multi-Barrier (2023-2034) (\$MN)
- Table 17 Global High-Barrier Packaging Market Outlook, By Packaging Format (2023-2034) (\$MN)
- Table 18 Global High-Barrier Packaging Market Outlook, By Films and Wraps (2023-2034) (\$MN)

Table 19 Global High-Barrier Packaging Market Outlook, By Pouches and Bags (2023-2034) (\$MN)

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

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

Table 22 Global High-Barrier Packaging Market Outlook, By Bottles and Containers (2023-2034) (\$MN)

Table 23 Global High-Barrier Packaging Market Outlook, By Cartons and Boxes (2023-2034) (\$MN)

Table 24 Global High-Barrier Packaging Market Outlook, By Other Packaging Formats (2023-2034) (\$MN)

Table 25 Global High-Barrier Packaging Market Outlook, By Technology (2023-2034) (\$MN)

Table 26 Global High-Barrier Packaging Market Outlook, By Co-extrusion (2023-2034) (\$MN)

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

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

Table 29 Global High-Barrier Packaging Market Outlook, By Metalization (2023-2034) (\$MN)

Table 30 Global High-Barrier Packaging Market Outlook, By Thin Film Deposition (2023-2034) (\$MN)

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

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

Table 33 Global High-Barrier Packaging Market Outlook, By Food & Beverage (2023-2034) (\$MN)

Table 34 Global High-Barrier Packaging Market Outlook, By Pharmaceuticals & Medical Devices (2023-2034) (\$MN)

Table 35 Global High-Barrier Packaging Market Outlook, By Cosmetics & Personal Care (2023-2034) (\$MN)

Table 36 Global High-Barrier Packaging Market Outlook, By Industrial & Chemical Packaging (2023-2034) (\$MN)

Table 37 Global High-Barrier Packaging Market Outlook, By Electronics & Semiconductors (2023-2034) (\$MN)

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

Table 39 Global High-Barrier Packaging Market Outlook, By Other Applications

(2023-2034) (\$MN)

Table 40 Global High-Barrier Packaging Market Outlook, By End User (2023-2034)  
(\$MN)

Table 41 Global High-Barrier Packaging Market Outlook, By Food Manufacturers  
(2023-2034) (\$MN)

Table 42 Global High-Barrier Packaging Market Outlook, By Pharmaceutical Companies  
(2023-2034) (\$MN)

Table 43 Global High-Barrier Packaging Market Outlook, By Cosmetic Brands  
(2023-2034) (\$MN)

Table 44 Global High-Barrier Packaging Market Outlook, By Electronics OEMs  
(2023-2034) (\$MN)

Table 45 Global High-Barrier Packaging Market Outlook, By Contract Packaging Firms  
(2023-2034) (\$MN)

Table 46 Global High-Barrier Packaging Market Outlook, By Retail and Private Labels  
(2023-2034) (\$MN)

Table 47 Global High-Barrier Packaging Market Outlook, By Other End Users  
(2023-2034) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Rest of the World  
(RoW) are also represented in the same manner as above.

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