

Plastic-Free Packaging Market Forecasts to 2032 – Global Analysis By Material Type (Paper & Paperboard, Molded Fiber, Bioplastics, Glass and Other Material Types), Packaging Format, Distribution Channel, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Plastic-Free Packaging Market is accounted for \$9.13 billion in 2025 and is expected to reach \$14.11 billion by 2032 growing at a CAGR of 6.4% during the forecast period. Plastic-free packaging refers to packaging solutions designed without the use of conventional plastics derived from fossil fuels. It utilizes alternative, sustainable materials such as paper, cardboard, plant-based polymers, glass, aluminum, and compostable bioplastics to minimize environmental impact. The primary goal of plastic-free packaging is to reduce plastic pollution, promote recyclability, and encourage circular economy practices. This approach supports sustainability by using renewable, biodegradable, or recyclable resources that have a lower carbon footprint. Widely adopted across industries, plastic-free packaging aligns with global efforts to reduce single-use plastics and meet consumer demand for eco-friendly and responsible packaging options.

Market Dynamics:

Driver:

Innovation in materials and packaging technologies

Advancements in molded fiber, barrier coatings, and compostable biopolymers are accelerating adoption across food, cosmetics, and logistics sectors. These technologies are fostering performance parity with plastic in terms of durability, shelf-life, and

printability. Strategic collaborations between packaging manufacturers and material science startups are boosting commercialization. Regulatory incentives and eco-certifications are propelling investment in scalable, compliant formats. Innovation continues to be the cornerstone of market differentiation and growth.

Restraint:

High cost of alternative, plastic-free materials and production

Bioplastics, glass, and fiber-based formats often require specialized equipment and longer processing cycles, which degrade operational efficiency. Limited economies of scale and volatile raw material prices hinder affordability for SMEs. Retrofitting existing lines and training labor add to transition costs. Cost-sensitive regions face adoption barriers despite rising sustainability awareness. These financial pressures continue to limit penetration in mass-market applications.

Opportunity:

Corporate sustainability commitments & brand differentiation

Global brands are pledging to eliminate single-use plastics and achieve net-zero packaging footprints by 2030. These goals are accelerating partnerships with eco-packaging innovators and suppliers. Premium positioning and eco-labeling are boosting consumer preference for plastic-free formats. Retailers and e-commerce platforms are incentivizing suppliers through green procurement policies. This shift is fostering long-term investment in scalable, brand-aligned packaging solutions.

Threat:

Raw-material availability and supply chain constraints

Limited access to sustainably sourced fiber, biopolymers, and specialty coatings hampers production scalability. Climate disruptions, geopolitical tensions, and energy volatility degrade supply reliability. Fragmented supplier networks and lack of harmonized standards constrain global sourcing strategies. These challenges increase lead times and inventory costs, limiting responsiveness and market agility.

Covid-19 Impact:

The market experienced temporary disruption due to Covid-19, but recovery is now accelerating momentum. Lockdowns and supply chain breakdowns hindered access to sustainable raw materials and delayed product rollouts. Hygiene concerns and cost pressures led to a short-term resurgence in single-use plastics. However, post-pandemic consumer awareness and regulatory tightening are boosting demand for eco-friendly formats. Brands are re-evaluating packaging strategies to align with ESG goals and resilient supply chains. This rebound is fostering innovation and investment in scalable, plastic-free alternatives.

The rigid packaging segment is expected to be the largest during the forecast period

The rigid packaging segment is expected to account for the largest market share during the forecast period owing to strong demand from food, beverage, and personal care sectors. Adoption of glass, metal, and molded fiber formats is accelerating due to their durability and premium shelf appeal. Superior recyclability and structural integrity are propelling rigid formats in high-volume applications. Innovations in fiber-based trays, jars, and containers are fostering substitution of traditional plastic formats. Regulatory mandates on extended producer responsibility are further driving uptake. This segment leads in both volume and value terms.

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

Over the forecast period, the bioplastics segment is predicted to witness the highest growth rate due to rising demand for compostable and bio-based materials. Investment in PLA, PHA, and starch blends is boosting performance parity with conventional plastics. Flexible and semi-rigid applications are expanding owing to improved barrier properties and processability. Regulatory support and consumer preference for biodegradable options are fostering market expansion. Bioplastics are increasingly used in foodservice, e-commerce, and healthcare packaging.

Region with largest share:

During the forecast period, the Europe region is expected to hold the largest market share due to stringent regulations, high consumer awareness, and advanced recycling infrastructure. The EU's Single-Use Plastics Directive is accelerating adoption across industries. Retailers and manufacturers are investing in fiber, metal, and glass formats to meet sustainability goals. Circular economy policies and eco-labeling are fostering innovation and compliance. Europe's leadership is anchored in policy maturity and

market readiness.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR due to rapid urbanization, rising disposable incomes, and expanding e-commerce. Government bans on single-use plastics in India, China, and Southeast Asia are accelerating demand for biodegradable alternatives. Local startups and global players are investing in regional manufacturing hubs for plastic-free formats. Supply chain localization and cost-effective innovation are boosting scalability. Asia Pacific's growth is driven by policy momentum and market dynamism.

Key players in the market

Some of the key players in Plastic-Free Packaging Market include Amcor plc, Mondi Group, Tetra Pak International S.A., DS Smith plc, Smurfit Kappa Group plc, International Paper Company, Sealed Air Corporation, Berry Global Inc., WestRock Company, Stora Enso Oyj, Sonoco Products Company, EcoEnclose LLC, Ranpak Holdings Corp., Ball Corporation and UPM-Kymmene Corporation.

Key Developments:

In October 2024, Mondi announced the acquisition of Schumacher Packaging's Western European assets for €634 million. This acquisition strengthens Mondi's fiber-based packaging portfolio, supporting the transition away from plastic in e-commerce and FMCG applications.

In August 2023, Amcor announced the acquisition of Phoenix Flexibles, a scalable flexible packaging plant in Gujarat, India. The facility generates approximately US\$20 million in annual revenue from food, home care, and personal care applications.

Material Types Covered:

Paper & Paperboard

Molded Fiber

Bioplastics

Glass

Metal

Other Material Types

Packaging Formats Covered:

Rigid Packaging

Flexible Packaging

Other Packaging Formats

Distribution Channels Covered:

Retail Stores

E-Commerce Platforms

Direct-to-Consumer (D2C)

End Users Covered:

Food & Beverage

Pharmaceuticals

Cosmetics & Personal Care

Consumer Goods

E-Commerce & Logistics

Healthcare & Medical Devices

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 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

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