

# Stand-Up Pouches Market Forecasts to 2032 – Global Analysis By Material Type (Plastic, Paper & Paper-based Laminates, Biodegradable, Laminates and Other Material Types), Closure, Capacity, End User and By Geography

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## Abstracts

According to Statistics MRC, the Global Stand-Up Pouches Market is accounted for \$33.7 billion in 2025 and is expected to reach \$65.8 billion by 2032 growing at a CAGR of 10% during the forecast period. Stand-up pouches are flexible packaging solutions designed with a bottom gusset that allows them to stand upright on shelves, providing convenience, stability, and visual appeal. Made from durable multi-layer materials such as plastic films, foil, or paper, these pouches offer strong barrier protection against moisture, air, and contaminants, preserving product freshness and extending shelf life. They are widely used across industries including food and beverages, cosmetics, pharmaceuticals, and household products. Stand-up pouches support resealable features like zippers or spouts, enhancing consumer convenience. Their lightweight structure, cost-effectiveness, and sustainability make them a preferred alternative to rigid packaging formats.

Market Dynamics:

Driver:

Growth in packaged food, beverage and e-commerce channels

Rising beverage consumption encourages manufacturers to use flexible pouches for liquids and ready-to-drink products. E-commerce expansion increases the need for lightweight, durable, and easy-to-ship packaging like stand-up pouches. These pouches

offer longer shelf life, preserving product quality during transport and storage. Brands leverage attractive designs and customization to appeal to online shoppers. Overall, the synergy of food, beverage, and e-commerce growth strongly propels the market.

Restraint:

#### Regulatory pressure on single-use plastics

Governments worldwide are implementing strict bans and restrictions on non-recyclable and single-use packaging materials. These regulations increase compliance costs for manufacturers, who must invest in alternative eco-friendly materials. Limited availability and higher costs of sustainable substitutes can reduce production efficiency and profit margins. Companies may face delays in product launches due to the need to reformulate packaging solutions. Overall, stringent environmental policies slow market growth by creating operational and financial hurdles for stakeholders.

Opportunity:

#### Move toward sustainable formats

Stand-up pouches use less material compared to rigid packaging, reducing waste and lowering carbon footprints. Many manufacturers are adopting recyclable, biodegradable, and compostable materials to align with sustainability goals. This shift not only addresses environmental concerns but also meets regulatory requirements in several regions. Consumers perceive sustainable packaging as a reflection of brand responsibility, boosting demand. Overall, the adoption of sustainable formats is reshaping the market by enhancing both environmental and economic value.

Threat:

#### Performance trade-offs with sustainable films

Sustainable materials often have lower barrier properties, affecting the shelf life of packaged products. They may also be less durable, increasing the risk of pouch damage during transportation. Manufacturing processes for eco-friendly films can be more complex and costly, raising overall production expenses. Some consumers and brands may hesitate to adopt pouches that compromise product quality. As a result, these performance challenges slow down market adoption despite increasing demand.

for sustainable packaging.

### Covid-19 Impact

The Covid-19 pandemic significantly influenced the stand-up pouches market, reshaping demand patterns across industries. With disruptions in supply chains and manufacturing halts, initial growth faced setbacks. However, rising demand for packaged food, beverages, and essential products during lockdowns fuelled the adoption of stand-up pouches. Increased consumer preference for hygienic, safe, and convenient packaging supported market recovery. The surge in e-commerce and home deliveries further boosted usage. Meanwhile, fluctuations in raw material availability and logistical challenges posed hurdles, yet the market adapted with resilient growth strategies.

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

The plastic segment is expected to account for the largest market share during the forecast period, due to its lightweight nature, which reduces transportation costs and enhances convenience. Its high durability and barrier properties protect products from moisture, oxygen, and contamination, extending shelf life. Plastic offers excellent flexibility in design, allowing for resealable features, spouts, and attractive printing for brand visibility. Additionally, it is more cost-effective compared to other materials, making it widely adopted across food, beverage, and personal care industries. The growing demand for sustainable and recyclable plastic solutions further strengthens its dominance in the market.

The personal care & cosmetics segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the personal care & cosmetics segment is predicted to witness the highest growth rate by driving demand for innovative, attractive, and functional packaging solutions. Stand-up pouches provide convenience, portability, and resealability, which align with consumer preferences in skincare, haircare, and cosmetic products. Their ability to preserve product freshness and extend shelf life makes them highly suitable for creams, lotions, and powders. The segment also benefits from customizable designs and sustainable materials, enhancing brand visibility and eco-friendly appeal. Growing online sales of beauty products further boost the adoption of stand-up pouches due to their lightweight and cost-efficient shipping advantages.

### Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share due to rising consumer preference for healthy snacks and plant-based protein sources. Increasing urbanization, changing dietary habits, and the popularity of premium nuts in confectionery and bakery applications are driving demand. Expanding retail channels, online platforms, and awareness of macadamia's nutritional benefits further support the market. Countries such as China, Japan, Australia, and South Korea are key contributors, with Australia being a leading producer. The region's focus on exports also strengthens market expansion.

### Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR by a mature demand base with strong consumer awareness about premium nut varieties. Growing applications in gourmet foods, bakery products, and dairy alternatives are boosting utilization. Health-conscious consumers prefer macadamias for their rich taste and nutritional benefits. The presence of established brands, widespread retail penetration, and innovation in value-added macadamia-based products foster growth. Imports primarily fulfil demand, as domestic production is limited, with Hawaii as a notable contributor. Sustainability and clean-label trends further shape market developments.

### Key players in the market

Some of the key players profiled in the Stand-Up Pouches Market include Amcor Plc, Mondi Plc, Sonoco Products Company, Constantia Flexibles, ProAmpac LLC, Smurfit Kappa Group, WestRock Company, Swiss Pac, Winpak Ltd., Uflex Limited, Glenroy Inc., Flair Flexible Packaging Corporation, Sealed Air Corporation, Huhtamaki Oyj and Bischof + Klein SE.

### Key Developments:

In March 2025, Amcor announced the launch of its new AmFiber Performance Paper stand-up pouch, a paper-based refill pack for instant coffee and dry beverage products. This new innovation – launching first across the Europe, Middle East and Africa region – is part of Amcor's AmFiber Performance Paper portfolio.

In February 2025, Mondi and Proquimia have collaborated to create paper-based, stand-

up pouches for dishwashing tabs in Spain and Portugal. The sustainable packaging and paper provider, Mondi, has conducted internal product impact assessments that demonstrate that the new solution has significantly lower CO2 emissions from cradle to gate, compared to plastic solution alternatives.

In October 2024, Mespac and Amcor have developed a 'recycle-ready' stand-up pouch designed for home care products such as soaps, cleaners, and laundry detergent, aiming to overcome the challenges of scaling up larger flexible packaging formats using recycle-ready materials.

#### Material Types Covered:

Plastic

Paper & Paper-based Laminates

Biodegradable

Laminates

Other Material Types

#### Closures Covered:

Zipper

Spout Pouches

Tear Notch

Valve

#### Capacities Covered:

50–250 g/ml

251–500 g/ml

501 g/ml – 2 kg/L

2 kg/L

End Users Covered:

Food & Beverages

Pet Food

Personal Care & Cosmetics

Household Care

Pharmaceuticals & Nutraceuticals

Industrial

Agricultural

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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