

Stretch & Shrink Film Packaging Market Forecasts to 2034 – Global Analysis By Film Type (Stretch Film and Shrink Film), Material Type, Product Type, Thickness, Packaging Type, Application, and By Geography

<https://marketpublishers.com/r/S3FDFB294077EN.html>

Date: May 2026

Pages: 200

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

ID: S3FDFB294077EN

Abstracts

According to Statistics MRC, the Global Stretch & Shrink Film Packaging Market is accounted for \$20.8 billion in 2026 and is expected to reach \$31.8 billion by 2034, growing at a CAGR of 5.5% during the forecast period. Stretch and shrink film packaging is a highly versatile plastic films used to secure, protect, and unitize products during storage and transportation. Stretch film wraps around items using tension, while shrink film tightly conforms to products when heat is applied. These films offer load stability, puncture resistance, moisture protection, and product visibility. Their lightweight nature reduces material usage and shipping costs. As e-commerce and supply chain complexities rise, these films have become essential for pallet wrapping, bundling, and tamper-evident packaging, ensuring cargo integrity across industries such as food, beverages, consumer goods, and pharmaceuticals.

Market Dynamics:

Driver:

Growing demand for safe and efficient logistics in e-commerce

The rapid expansion of e-commerce has intensified the need for secure, damage-free delivery of goods across long supply chains. Stretch and shrink films provide load stability, tamper resistance, and protection against moisture and dust, reducing product returns and waste. Their lightweight nature lowers shipping weight and fuel consumption, directly benefiting logistics providers. Additionally, automated packaging

lines increasingly rely on machine-applied films for high-speed, consistent wrapping. As online retail continues to grow globally, the demand for reliable, cost-effective packaging solutions like stretch and shrink films is accelerating, driving market expansion significantly.

Restraint:

Environmental concerns and recycling limitations

Stretch and shrink films are primarily made from non-biodegradable plastics such as LLDPE, LDPE, and PVC, raising serious environmental concerns. These films often end up in landfills or oceans due to low recycling rates, as many municipal facilities lack the capability to process flexible plastics. Although some films are recyclable, contamination from labels, adhesives, and residues complicates the process. Increasing regulatory pressure on single-use plastics and growing consumer preference for sustainable alternatives pose a significant challenge. Manufacturers are now under pressure to develop bio-based, biodegradable, or easily recyclable film solutions, which increases R&D and production costs.

Opportunity:

Development of recyclable and bio-based film solutions

Growing environmental awareness and stricter regulations are pushing manufacturers to innovate sustainable stretch and shrink films. Opportunities lie in developing multi-layer films with enhanced recyclability, post-consumer recycled (PCR) content, and bio-based polymers. For instance, polyolefin (POF) shrink films are already recyclable in many regions, and new materials like metallocene PE (mLLDPE) allow for down-gauging, reducing plastic use. Companies investing in circular economy models such as take-back programs and closed-loop recycling—can gain a competitive edge.

Threat:

Volatility in raw material prices

Stretch and shrink films are heavily dependent on petrochemical derivatives such as polyethylene and polypropylene. Fluctuations in crude oil prices, geopolitical tensions, and supply chain disruptions directly impact raw material costs, squeezing profit margins for manufacturers. Unexpected price spikes force packaging converters to

either absorb costs or pass them to end-users, potentially reducing demand. Moreover, resin supply shortages, as seen during extreme weather events or global crises, can halt production lines. Small and medium-sized players without long-term supply contracts are particularly vulnerable. This price volatility creates an unstable business environment and discourages long-term investment in film packaging technologies.

Covid-19 Impact

The COVID-19 pandemic had a mixed impact on the Stretch & Shrink Film Packaging market. Lockdowns and supply chain disruptions temporarily reduced industrial activity, affecting demand from manufacturing and non-essential goods sectors. However, the surge in e-commerce and home delivery of food, medical supplies, and consumer goods drove strong demand for secure, hygienic packaging. Stretch films became critical for stabilizing pallets in overburdened logistics networks, while shrink films ensured tamper-evident seals for pharmaceuticals and sanitizers. Labor shortages also accelerated the adoption of automated machine-applied films. Overall, the pandemic highlighted the essential role of these films in resilient supply chains, leading to sustained growth post-crisis.

The Machine Stretch Film Segment is Expected to be the Largest During the Forecast Period

The machine stretch film segment is expected to account for the largest market share, driven by increasing automation in warehousing and distribution centers. Machine stretch films offer consistent tension, higher load retention, and reduced material usage compared to hand-applied alternatives. They enable high-speed pallet wrapping, lowering labor costs and improving throughput. Large-scale industries such as food & beverage, consumer goods, and retail prefer machine films for their efficiency and reliability.

The Polyolefin (POF) Shrink Film Segment is Expected to have the Highest CAGR During the Forecast Period

Over the forecast period, the polyolefin (POF) shrink film segment is predicted to witness the highest growth rate, due to its superior clarity, toughness, and sealability compared to PVC. POF films are food-contact approved, odorless, and recyclable, making them ideal for pharmaceutical, cosmetic, and food packaging. They shrink evenly at lower temperatures, reducing energy consumption. As regulations tighten against PVC use, converters are shifting to POF.

Region with Largest Share:

During the forecast period, the North America region is expected to hold the largest market share, due to a well-established logistics and e-commerce infrastructure, high adoption of automated packaging equipment, and strong presence of leading film manufacturers like Berry Global and Sealed Air. The region's stringent food safety regulations drive demand for high-performance shrink films. Additionally, the United States military and industrial sectors rely heavily on durable stretch films for heavy-duty bundling. A mature recycling framework and ongoing innovations in sustainable films further solidify North America's dominant position in the global market.

Region with Highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, fueled by rapid industrialization, expanding e-commerce platforms like Alibaba and Flipkart, and booming food & beverage sectors in China, India, and Southeast Asia. Low-cost manufacturing and rising foreign direct investment in packaging facilities are increasing local production capacity. Governments are modernizing logistics infrastructure under initiatives like "Made in China 2025" and "Digital India." Additionally, the shift from traditional packaging to flexible films in retail and agriculture accelerates growth.

Key Players in the Market

Some of the key players in the Stretch & Shrink Film Packaging Market include Berry Global Inc., Amcor plc, Sealed Air Corporation, Sigma Plastics Group, Paragon Films, Boller? Inc., Coveris Holdings S.A., Dow Inc., Exxon Mobil Corporation, Intertape Polymer Group Inc., KI?ckner Pentaplast, Balcan Innovations Inc., Barbier Group, Bonset America Corporation, and HIPAC S.p.A.

Key Developments

In January 2026, Berry Global Group announced the expansion of its sustainable film production facility in Germany, increasing output of recyclable machine stretch films containing 30% post-consumer recycled content to meet European Union plastic reduction targets.

In March 2026, Amcor plc launched a new line of ultra-high-performance POF shrink

films with enhanced puncture resistance and 20% down-gauging capability, reducing material use without compromising load stability for beverage multipacks.

Film Types Covered:

Stretch Film

Shrink Film

Material Types Covered:

Linear Low-Density Polyethylene (LLDPE)

Low-Density Polyethylene (LDPE)

Polyvinyl Chloride (PVC)

Polypropylene (PP)

Polyolefin (POF)

Metallocene PE (mLLDPE)

Other Material Types

Product Types Covered:

Wraps

Hoods

Sleeves & Labels

Bundling Films

Thickness Covered:

Less than 12–15 microns

12–25 microns

25–35 microns

Above 35 microns

Packaging Types Covered:

Hand-applied Films

Machine-applied Films

Automatic Packaging Films

Applications Covered:

Pallet Wrapping & Unitization

Bundling & Multipack Packaging

Sleeve & Label Packaging

Tamper-evident Overwraps

Food & Beverage Packaging

Industrial Goods Packaging

Consumer Goods Packaging

Pharmaceutical Packaging

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:

Stretch & Shrink Film Packaging Market Forecasts to 2034 – Global Analysis By Film Type (Stretch Film and Shri...

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 STRETCH & SHRINK FILM PACKAGING MARKET, BY FILM TYPE

- 5.1 Stretch Film
 - 5.1.1 Hand Stretch Film
 - 5.1.2 Machine Stretch Film
 - 5.1.3 Pre-stretched Film
- 5.2 Shrink Film
 - 5.2.1 Polyolefin (POF) Shrink Film
 - 5.2.2 PVC Shrink Film
 - 5.2.3 PE Shrink Film

6 GLOBAL STRETCH & SHRINK FILM PACKAGING MARKET, BY MATERIAL TYPE

- 6.1 Linear Low-Density Polyethylene (LLDPE)
- 6.2 Low-Density Polyethylene (LDPE)
- 6.3 Polyvinyl Chloride (PVC)
- 6.4 Polypropylene (PP)
- 6.5 Polyolefin (POF)
- 6.6 Metallocene PE (mLLDPE)
- 6.7 Other Material Types

7 GLOBAL STRETCH & SHRINK FILM PACKAGING MARKET, BY PRODUCT TYPE

- 7.1 Wraps
- 7.2 Hoods
- 7.3 Sleeves & Labels
- 7.4 Bundling Films

8 GLOBAL STRETCH & SHRINK FILM PACKAGING MARKET, BY THICKNESS

- 8.1 Less than 12–15 microns
- 8.2 12–25 microns
- 8.3 25–35 microns
- 8.4 Above 35 microns

9 GLOBAL STRETCH & SHRINK FILM PACKAGING MARKET, BY PACKAGING TYPE

- 9.1 Hand-applied Films
- 9.2 Machine-applied Films
- 9.3 Automatic Packaging Films

10 GLOBAL STRETCH & SHRINK FILM PACKAGING MARKET, BY APPLICATION

- 10.1 Pallet Wrapping & Unitization
- 10.2 Bundling & Multipack Packaging
- 10.3 Sleeve & Label Packaging
- 10.4 Tamper-evident Overwraps
- 10.5 Food & Beverage Packaging
- 10.6 Industrial Goods Packaging
- 10.7 Consumer Goods Packaging
- 10.8 Pharmaceutical Packaging

11 GLOBAL STRETCH & SHRINK FILM 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 Berry Global Inc.
- 14.2 Amcor plc
- 14.3 Sealed Air Corporation
- 14.4 Sigma Plastics Group
- 14.5 Paragon Films
- 14.6 Bollar? Inc.
- 14.7 Coveris Holdings S.A.
- 14.8 Dow Inc.
- 14.9 Exxon Mobil Corporation
- 14.10 Intertape Polymer Group Inc.
- 14.11 KI?ckner Pentaplast
- 14.12 Balcan Innovations Inc.
- 14.13 Barbier Group
- 14.14 Bonset America Corporation
- 14.15 HIPAC S.p.A.

List Of Tables

LIST OF TABLES

- Table 1 Global Stretch & Shrink Film Packaging Market Outlook, By Region (2023-2034) (\$MN)
- Table 2 Global Stretch & Shrink Film Packaging Market Outlook, By Film Type (2023-2034) (\$MN)
- Table 3 Global Stretch & Shrink Film Packaging Market Outlook, By Stretch Film (2023-2034) (\$MN)
- Table 4 Global Stretch & Shrink Film Packaging Market Outlook, By Hand Stretch Film (2023-2034) (\$MN)
- Table 5 Global Stretch & Shrink Film Packaging Market Outlook, By Machine Stretch Film (2023-2034) (\$MN)
- Table 6 Global Stretch & Shrink Film Packaging Market Outlook, By Pre-stretched Film (2023-2034) (\$MN)
- Table 7 Global Stretch & Shrink Film Packaging Market Outlook, By Shrink Film (2023-2034) (\$MN)
- Table 8 Global Stretch & Shrink Film Packaging Market Outlook, By Polyolefin (POF) Shrink Film (2023-2034) (\$MN)
- Table 9 Global Stretch & Shrink Film Packaging Market Outlook, By PVC Shrink Film (2023-2034) (\$MN)
- Table 10 Global Stretch & Shrink Film Packaging Market Outlook, By PE Shrink Film (2023-2034) (\$MN)
- Table 11 Global Stretch & Shrink Film Packaging Market Outlook, By Material Type (2023-2034) (\$MN)
- Table 12 Global Stretch & Shrink Film Packaging Market Outlook, By Linear Low-Density Polyethylene (LLDPE) (2023-2034) (\$MN)
- Table 13 Global Stretch & Shrink Film Packaging Market Outlook, By Low-Density Polyethylene (LDPE) (2023-2034) (\$MN)
- Table 14 Global Stretch & Shrink Film Packaging Market Outlook, By Polyvinyl Chloride (PVC) (2023-2034) (\$MN)
- Table 15 Global Stretch & Shrink Film Packaging Market Outlook, By Polypropylene (PP) (2023-2034) (\$MN)
- Table 16 Global Stretch & Shrink Film Packaging Market Outlook, By Polyolefin (POF) (2023-2034) (\$MN)
- Table 17 Global Stretch & Shrink Film Packaging Market Outlook, By Metallocene PE (mLLDPE) (2023-2034) (\$MN)
- Table 18 Global Stretch & Shrink Film Packaging Market Outlook, By Other Material

Types (2023-2034) (\$MN)

Table 19 Global Stretch & Shrink Film Packaging Market Outlook, By Product Type (2023-2034) (\$MN)

Table 20 Global Stretch & Shrink Film Packaging Market Outlook, By Wraps (2023-2034) (\$MN)

Table 21 Global Stretch & Shrink Film Packaging Market Outlook, By Hoods (2023-2034) (\$MN)

Table 22 Global Stretch & Shrink Film Packaging Market Outlook, By Sleeves & Labels (2023-2034) (\$MN)

Table 23 Global Stretch & Shrink Film Packaging Market Outlook, By Bundling Films (2023-2034) (\$MN)

Table 24 Global Stretch & Shrink Film Packaging Market Outlook, By Thickness (2023-2034) (\$MN)

Table 25 Global Stretch & Shrink Film Packaging Market Outlook, By Less than 12–15 microns (2023-2034) (\$MN)

Table 26 Global Stretch & Shrink Film Packaging Market Outlook, By 12–25 microns (2023-2034) (\$MN)

Table 27 Global Stretch & Shrink Film Packaging Market Outlook, By 25–35 microns (2023-2034) (\$MN)

Table 28 Global Stretch & Shrink Film Packaging Market Outlook, By Above 35 microns (2023-2034) (\$MN)

Table 29 Global Stretch & Shrink Film Packaging Market Outlook, By Packaging Type (2023-2034) (\$MN)

Table 30 Global Stretch & Shrink Film Packaging Market Outlook, By Hand-applied Films (2023-2034) (\$MN)

Table 31 Global Stretch & Shrink Film Packaging Market Outlook, By Machine-applied Films (2023-2034) (\$MN)

Table 32 Global Stretch & Shrink Film Packaging Market Outlook, By Automatic Packaging Films (2023-2034) (\$MN)

Table 33 Global Stretch & Shrink Film Packaging Market Outlook, By Application (2023-2034) (\$MN)

Table 34 Global Stretch & Shrink Film Packaging Market Outlook, By Pallet Wrapping & Unitization (2023-2034) (\$MN)

Table 35 Global Stretch & Shrink Film Packaging Market Outlook, By Bundling & Multipack Packaging (2023-2034) (\$MN)

Table 36 Global Stretch & Shrink Film Packaging Market Outlook, By Sleeve & Label Packaging (2023-2034) (\$MN)

Table 37 Global Stretch & Shrink Film Packaging Market Outlook, By Tamper-evident Overwraps (2023-2034) (\$MN)

Table 38 Global Stretch & Shrink Film Packaging Market Outlook, By Food & Beverage Packaging (2023-2034) (\$MN)

Table 39 Global Stretch & Shrink Film Packaging Market Outlook, By Industrial Goods Packaging (2023-2034) (\$MN)

Table 40 Global Stretch & Shrink Film Packaging Market Outlook, By Consumer Goods Packaging (2023-2034) (\$MN)

Table 41 Global Stretch & Shrink Film Packaging Market Outlook, By Pharmaceutical Packaging (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.

I would like to order

Product name: Stretch & Shrink Film Packaging Market Forecasts to 2034 – Global Analysis By Film Type (Stretch Film and Shrink Film), Material Type, Product Type, Thickness, Packaging Type, Application, and By Geography

Product link: <https://marketpublishers.com/r/S3FDFB294077EN.html>

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

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/S3FDFB294077EN.html>