

Composite Cans Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Closure Type (Caps and Lids), By Production Type (Spiral Winding, Convolute Winding, and Linear Draw), By Can Diameter (Less than 50 mm, 50mm-100mm, and Others), By End User (Food & Beverage, Agriculture, and Others), By Region & Competition, 2021-2031F

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Abstracts

The Global Composite Cans Market is projected to expand significantly, rising from a valuation of USD 6.21 Billion in 2025 to USD 8.92 Billion by 2031, reflecting a compound annual growth rate of 6.22%. These rigid, cylindrical containers are generally manufactured using multiple layers of spiral-wound recycled paperboard that are lined with protective barriers and sealed with plastic or metal ends to maintain structural stability. The primary force propelling this market is the intensifying global requirement for sustainable packaging, as producers actively look for biodegradable substitutes for rigid plastics to minimize ecological impact. This transition is further bolstered by the container's capacity to offer superior branding space and prolonged shelf life, features that are highly valued by consumer goods manufacturers. As reported by the Confederation of European Paper Industries (Cepi), production volumes for packaging paper and board grades rose by 6.5% in 2024 relative to the prior year, highlighting the strong industrial support for fiber-based packaging innovations.

Despite these positive indicators, the market encounters substantial obstacles related to the recycling difficulties associated with multi-material constructions. While the paperboard exterior is renewable, the incorporation of plastic or metal liners and

closures frequently complicates the separation process at conventional material recovery centers. This technical constraint can reduce the efficiency of waste management streams and may cause hesitation among brands and regulators who are aiming for 100% mono-material recyclability, potentially restricting broader market growth in regions with stringent environmental regulations.

Market Driver

The migration toward eco-friendly and sustainable packaging serves as a major driver for the global composite cans sector. Companies are increasingly shifting away from metal and rigid plastic containers in favor of fiber-based options to lower their environmental footprint and align with circular economy objectives. This strategic change is evident among leading consumer goods corporations that are redesigning their packaging to improve recyclability while maintaining durability. For example, Kellanova announced in a January 2024 press release titled 'Pringles reveals new paper tube' that it introduced a recyclable Pringles tube in Belgium; this new design is composed of 90% paper and replaces the conventional steel base to ensure compatibility with standard paper recycling systems, thereby meeting strict regulations on single-use materials and satisfying consumer demand for renewable options.

Concurrently, the booming convenience and ready-to-eat food industries are generating significant demand for high-performance composite containers. These cans provide critical barrier properties that extend shelf life and maintain freshness for confectionery, snacks, and powdered drinks, while their resealable features cater to on-the-go consumption trends. The strength of this demand is highlighted by recent market data; the National Confectioners Association's 'State of Treating 2024' report from March 2024 notes that total U.S. confectionery sales hit a record \$48 billion in 2023. To accommodate such high consumption levels, packaging leaders are sustaining high production rates, with Sonoco Products Company reporting net sales of \$928 million for its Consumer Packaging segment in the second quarter of 2024, demonstrating the vital role of rigid paper containers in the food supply chain.

Market Challenge

A major constraint facing the Global Composite Cans Market is the complexity involved in recycling multi-material designs. Unlike mono-material packaging, composite cans generally fuse a paperboard body with adherent plastic or metal closures and linings, creating considerable technical challenges at material recovery facilities where separating these components is often too costly. This issue frequently compels waste

management operators to send these containers to landfills or incineration rather than recycling streams, a practice that conflicts with the sustainability goals of environmentally aware brands. As a result, major consumer goods firms are becoming more cautious about adopting composite formats, concerned about failing to meet strict Extended Producer Responsibility (EPR) laws that increasingly prioritize simple, easily separable packaging structures.

This friction within the industry is mirrored in broader data concerning the recovery of fiber-based packaging. The European Paper Recycling Council (EPRC) reported in 2024 that the recycling rate for paper products across Europe reached 75.1%. Although this percentage suggests a well-developed infrastructure for standard paper grades, the unrecovered portion underscores the ongoing difficulty in effectively capturing and processing complex, multi-layered packaging within current municipal systems. This gap in recoverability directly restricts the ability of composite can manufacturers to position their products as fully circular solutions, thereby hindering expansion in markets where 100% recyclability is a mandatory condition for entry.

Market Trends

A transformative trend in the Global Composite Cans Market is the expansion into cosmetic and luxury personal care applications, pushing the format beyond its traditional dominance in commodity food products. Premium beauty brands are increasingly selecting rigid paper containers to comply with "clean beauty" principles, utilizing the tactile appeal of paperboard to project high-end aesthetics while removing single-use plastics from their supply chains. This shift is financially feasible because affluent consumers show a clear willingness to pay higher prices for environmentally responsible packaging. As noted in Smurfit Kappa's 'UK Half-Yearly Insights Report 2024' from August 2024, 49% of consumers expressed a readiness to pay more for sustainable delivery and packaging, providing the economic justification for luxury manufacturers to invest in these value-added, fiber-based formats.

At the same time, the incorporation of connected and smart packaging technologies is reshaping supply chain visibility and consumer engagement within the sector. Producers are embedding dynamic QR codes and near-field communication (NFC) tags directly onto paperboard surfaces, transforming the container into a digital portal that provides interactive content, traceability, and product authentication without the need for extra labels. This digitalization is rapidly becoming popular as brands attempt to connect physical products with digital experiences to retain tech-savvy users. According to the 'QR Code Statistics for 2025' report by QRCodeChimp in November 2024, the

advertising and marketing sectors saw a 323% increase in QR code scans in 2023, highlighting the substantial growth in consumer willingness to engage with these smart packaging innovations.

Key Market Players

Ace Paper Tube

Bharath Paper Conversions

Canfab Packaging Inc.

Compocan Industries

Corex Group

Halaspack Bt.

Heartland Products Group LLC

Kunert Gruppe

Marshall Paper Tube Company, Inc.

Mondi Group

Report Scope

In this report, the Global Composite Cans Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Composite Cans Market, By Closure Type

Caps

Lids

Composite Cans Market, By Production Type

Spiral Winding

Convolute Winding

Linear Draw

Composite Cans Market, By Can Diameter

Less than 50 mm

50mm-100mm

Others

Composite Cans Market, By End User

Food & Beverage

Agriculture

Others

Composite Cans Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global

Composite Cans Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Closure Ty...

Composite Cans Market.

Available Customizations:

Global Composite Cans Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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