

Industrial Packaging Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Pack Type (Drums, Pails, IBCS, Sacks, Others), By Application (Chemical & Pharmaceuticals, Oil & Lubricants, Building & Construction, Food & Beverage, Automotive, Others), By Region and Competition

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Abstracts

Global Industrial Packaging Market has valued at USD61.23 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 3.18% through 2028. Industrial packaging refers to the specialized packaging solutions designed for the transportation, storage, and protection of goods in industrial settings. It is specifically customized to meet the unique requirements and challenges of industries such as manufacturing, logistics, and distribution. It includes materials, techniques, and container types, including pallets, crates, drums, intermediate bulk containers (IBCs), and specialized boxes. It ensures the safe handling and preservation of products throughout the supply chain and withstands rigorous conditions, including rough handling, transportation, and exposure to various environmental factors.

Industrial packaging is produced from durable materials such as metal, wood, plastic, or corrugated fiberboard, which provide strength and resilience to the packaged goods. The use of these materials ensures that the packaging can withstand heavy loads, impacts, and other external forces during transit and storage. Additionally, industrial packaging can incorporate features such as cushioning, moisture resistance, or temperature control to protect goods during transit, especially for sensitive or perishable products.

The market for industrial packaging is primarily driven by the growing packaging demand among numerous sectors such as pharmaceuticals, cosmetics, personal care, and food and beverages (F&B). These industries require packaging solutions that not only provide effective protection but also showcase their products attractively and comply with regulatory standards. Industrial packaging plays a crucial role in ensuring product quality, safety, and efficacy, while also extending the shelf-life of goods.

Moreover, manufacturing companies are increasingly adopting modern technologies to produce recyclable pouches and aluminum cans with different thicknesses, densities, and strengths. This innovation in packaging materials and designs represents another major growth-inducing factor in the industrial packaging market. The ability to produce packaging that is environmentally friendly, lightweight, and cost-effective is driving the adoption of these advanced packaging solutions.

Furthermore, the recent onset of the coronavirus disease (COVID-19) pandemic has had a significant impact on the industrial packaging market. With the implementation of mandatory lockdowns and restrictions on physical retail, consumers have shifted towards online shopping and e-commerce platforms. This shift has created a surge in demand for industrial packaging to support the packaging and delivery of goods purchased online. The expanding e-commerce and online platform channels have further accelerated the demand for industrial packaging, particularly in the online retail industry.

In conclusion, industrial packaging plays a vital role in ensuring the safe and efficient transportation, storage, and protection of goods in various industries. Its customization, durability, and incorporation of advanced features make it an essential component of the supply chain. The growing packaging demand among different sectors, the adoption of modern technologies, and the shift towards online shopping have all contributed to the continuous growth of the industrial packaging market.

Key Market Drivers

Growing Demand of Industrial Packaging from Pharmaceutical Industry

Industrial packaging involves the use of various packaging materials to protect, store, and transport goods from the producer to the consumer. This type of packaging is used in industries such as food and beverage, chemicals, pharmaceuticals, construction, and more. Industrial packaging solutions include bulk containers, drums, sacks, crates, totes, and others, designed to withstand harsh conditions during transport and storage.

The pharmaceutical industry has a critical need for effective and safe packaging solutions. The industry deals with sensitive products that require stringent handling and storage conditions. These products, including drugs, vaccines, and medical devices, must be kept away from contaminants and environmental factors that might affect their quality and efficacy.

Moreover, the pharmaceutical industry has regulatory obligations that necessitate compliance with specific packaging requirements. These regulations ensure that products are appropriately labeled, tamper-evident, child-resistant, and capable of maintaining product stability throughout the distribution process.

The increasing demand for pharmaceutical products, fueled by an aging global population and the ongoing COVID-19 pandemic, has resulted in a surge in the industrial packaging market. The need for safe and efficient distribution of vaccines, medications, and other healthcare supplies worldwide has put a spotlight on the crucial role of industrial packaging in ensuring product integrity and patient safety.

The pharmaceutical industry's demand for innovative and sustainable packaging solutions is also driving advancements in the industrial packaging sector. Manufacturers are exploring the development of smart packaging solutions that can monitor temperature, humidity, and other environmental factors to ensure product quality and safety. Additionally, there is a growing emphasis on the use of biodegradable and recyclable packaging materials to address environmental concerns and reduce waste in the pharmaceutical supply chain.

As the pharmaceutical industry continues to expand, the demand for efficient and reliable industrial packaging solutions is set to grow. The increasing focus on sustainability and innovation in packaging design is likely to drive further growth in the industrial packaging market as companies seek to meet regulatory requirements, enhance product protection, and minimize their environmental impact.

In conclusion, the growing demand from the pharmaceutical industry is a significant driver of the global industrial packaging market. As this industry continues to innovate and expand, the need for advanced, efficient, and sustainable industrial packaging solutions will continue to drive growth in the market. Manufacturers and suppliers in the industrial packaging sector must adapt and evolve to meet the evolving needs and expectations of the pharmaceutical industry, ensuring the safe and reliable delivery of healthcare products to patients worldwide.

Growing Demand of Industrial Packaging from Food & Beverage Industry

In the food & beverage industry, packaging plays a vital role in preserving the quality, freshness, and safety of products. It goes beyond just a means of containment; packaging serves as a shield against environmental factors, contaminants, and tampering, ensuring that food items reach consumers in optimal condition. By extending the shelf life and maintaining the quality of products, packaging contributes significantly to reducing food waste and enhancing consumer satisfaction.

Moreover, innovative packaging designs have the power to captivate consumers and enhance product appeal. They not only catch the eye but also provide essential information to consumers, such as nutritional facts, ingredients, and usage instructions. Packaging can even facilitate ease of use, making it more convenient for consumers to access and consume their favorite food and beverage products.

As the food & beverage industry continues to witness remarkable growth, driven by changing consumer preferences and evolving lifestyles, the demand for industrial packaging solutions has skyrocketed. The increasing inclination towards convenience foods, ready-to-eat meals, and packaged drinks necessitates the development of effective and innovative packaging solutions. This trend has fueled the growth of the industrial packaging market, as manufacturers strive to meet the demand for efficient product distribution and marketing.

Furthermore, sustainability has become a top priority for the food & beverage industry, leading to an increased demand for eco-friendly packaging solutions. The use of biodegradable and recyclable materials in food & beverage packaging has gained momentum, contributing to the growth of the industrial packaging market. This shift towards sustainable practices not only addresses environmental concerns but also resonates with consumers who value eco-friendly choices.

Another significant factor driving the demand for industrial packaging is the rise of e-commerce in the food & beverage sector. With the increasing popularity of online grocery shopping and food delivery services, the need for durable and efficient packaging solutions has become more pressing. Packaging must withstand the rigors of transportation and ensure that products arrive intact, fresh, and ready for consumption.

As the food & beverage industry continues to evolve and adapt to changing consumer preferences and environmental considerations, the demand for advanced, reliable, and

sustainable industrial packaging solutions is expected to grow. The emergence of smart packaging, capable of monitoring product conditions and providing real-time information, is likely to spur further innovation in the field. This innovative approach not only enhances product safety but also improves supply chain efficiency and consumer experience.

In conclusion, the growing demand from the food & beverage industry significantly drives the global industrial packaging market. As this sector continues to expand, innovate, and adapt, its impact on the industrial packaging market will remain substantial. The food & beverage industry recognizes the critical role that packaging plays in ensuring product quality, safety, and consumer satisfaction, and will continue to seek new packaging solutions that meet the evolving needs of the market.

Key Market Challenges

Volatility in Price of Raw Materials

Price volatility refers to the day-to-day percentage difference in the price of commodities. It is a measure of the degree of variation in prices rather than the actual price levels. This volatility has significant implications for various sectors, including the industrial packaging industry.

In the industrial packaging sector, raw materials such as paper, plastic, metal, and wood are commonly used. These materials are highly susceptible to price fluctuations due to various factors, including disruptions in the supply chain, geopolitical tensions, and changes in commodity prices.

The heavy reliance on these raw materials makes the industrial packaging sector particularly vulnerable to price volatility. When prices rise unpredictably, it can have a substantial impact on the profitability and competitiveness of businesses operating in this sector.

For instance, when raw material costs increase, the production costs for packaging manufacturers also rise. If these increased costs cannot be passed on to customers due to market conditions or the nature of the product, it can result in reduced profit margins for manufacturers. This, in turn, can affect the overall financial health of businesses in the sector.

Furthermore, price volatility introduces a level of uncertainty in budgeting and

forecasting for businesses. The unpredictability of prices makes it challenging for companies to effectively plan and allocate resources. Managing costs and maintaining profitability becomes more complex in such an environment.

In summary, price volatility in the industrial packaging industry can have far-reaching effects. It impacts the cost structure, profitability, and overall competitiveness of businesses in the sector. Effective management of price fluctuations becomes crucial for sustainable growth and success in this industry.

Key Market Trends

Growing Demand of Chemical and Hazardous Materials Packaging

Chemical and hazardous materials packaging involves the use of specially designed containers to store and transport potentially dangerous substances. These substances can range from corrosive materials and flammable liquids to toxic wastes. The packaging is meticulously engineered to withstand extreme conditions, prevent leaks, and safeguard the materials from any damage or contamination during transit.

Moreover, there is an increasing focus on environmental safety and the prevention of chemical spills, which can have devastating effects on ecosystems and human health. This heightened attention has led to the implementation of stricter regulations surrounding the packaging and transportation of hazardous materials, further fueling the demand for specialized industrial packaging solutions that prioritize safety and sustainability.

Furthermore, the rise in global trade and the ever-growing complexity of supply chains have also contributed to the mounting need for effective hazardous materials packaging. As the volume of chemicals being shipped across borders continues to surge, the need for reliable and secure packaging solutions becomes increasingly paramount to ensure the safe and efficient transport of hazardous substances.

Given the substantial impact of this growing demand, the chemical and hazardous materials packaging sector has become a significant driver of the global industrial packaging market. Manufacturers are investing heavily in research and development to design innovative packaging solutions that not only meet the specific requirements of the chemical industry but also comply with stringent safety regulations and environmental standards.

In addition to this, the trend is fostering a culture of continuous innovation within the market. Manufacturers are actively exploring new materials and technologies to enhance the safety, efficiency, and sustainability of their packaging solutions. This includes the development of smart packaging systems that utilize sensors and monitoring technology to track and report the condition of the materials during transit, enabling timely intervention in case of any potential issues.

To summarize, the growing demand for chemical and hazardous materials packaging represents a major trend in the global industrial packaging market. Driven by the expansion of the chemical industry, the implementation of stricter environmental regulations, and the complexities of global trade, this trend is not only spurring innovation but also shaping the industrial packaging landscape for years to come. As a result, manufacturers are proactively adapting to meet the evolving needs of the market, ensuring the safe and sustainable transportation of hazardous materials.

Segmental Insights

Pack Type Insights

Based on the category of pack type, the IBCS segment emerged as the dominant player in the global market for Industrial Packaging in 2022. Intermediate Bulk Containers (IBCs) have emerged as the industry standard in the world of industrial packaging. Widely adopted by businesses globally, IBCs offer unmatched versatility and convenience. Primarily utilized in the oil and gas, chemical, and petrochemical sectors, these containers excel in storing and managing a wide range of products.

There are three main types of IBCs available: flexible, rigid, and foldable. Each type caters to specific needs and requirements, providing optimal product protection and cost-effective packaging solutions. Their ability to be reused multiple times, ample storage space, and compatibility with various industrial products contribute to significant reductions in overall packaging costs.

Moreover, the use of IBCs has gained traction in industries such as chemicals, pharmaceuticals, food, and beverage, as well as oil and lubricants. These containers offer corrosion-resistant properties, making them ideal for the safe storage and handling of both hazardous and non-hazardous liquid applications.

By leveraging the advantages of IBCs, businesses can ensure efficient and secure transportation, storage, and handling of their valuable products, while adhering to

stringent industry regulations and standards.

Application Insights

The food & beverage segment is projected to experience rapid growth during the forecast period. Due to the fear of extended lockdowns and the shift towards e-commerce and online platforms, there has been a significant surge in the sales of daily essentials, FMCG, and fresh food. As a result, the demand for bulk industrial packaging solutions has also seen a notable increase. Industrial packaging plays a crucial role in meeting food safety regulations, ensuring the smooth and clean transition of products from the manufacturing process to picking and packaging, all while minimizing human interaction.

In particular, bulk packaging with thermal liners has become widely adopted in the food and beverage industry. This type of packaging is designed to protect the contents from the detrimental effects of UV light and temperature degradation. With the rapidly increasing global population and urbanization, there has been a corresponding growth in global supply chains and retail markets. These factors, combined with the need for efficient and safe packaging, have further fueled the expansion of industrial packaging in the food and beverage industry.

The ongoing trend towards e-commerce, the importance of maintaining food safety, and the need for optimized supply chains are driving the continuous growth of industrial packaging. As consumer demands evolve and market dynamics change, it becomes increasingly vital for businesses to adapt and invest in reliable packaging solutions to ensure the integrity and quality of their products.

Regional Insights

Asia Pacific emerged as the dominant player in the Global Industrial Packaging Market in 2022, holding the largest market share in terms of value. Due to the significant demand from the food packaging industry in the region, the retail sales of grain, oil, and food in China reached a staggering 499.63 billion yuan (approximately \$70.41 billion), marking a remarkable 13.8 percent increase from the previous year, as reported by the Ministry of Industry and Information Technology (MIIT). Moreover, during the same period, beverage sales in China amounted to 63.46 billion yuan, showing a notable 6.3 percent year-on-year growth. The robust growth in retail sales is anticipated to drive an increased demand for packaging materials in the market.

Furthermore, according to the United States Department of Agriculture (USDA), the total value of all retail food and beverage sales in Japan in 2018 exceeded \$479.29 billion (\$53.339 billion), reflecting an overall growth of 2.3 percent. Additionally, the Momentum In India: Swiss SME Program (MISSP) highlights that the Indian packaging industry is projected to witness substantial growth, with its value expected to surge from CHF 75 billion in 2020 to CHF 205 billion by 2025.

Moreover, the packaging industry in China, as forecasted by the Sea-Circular Organization, is poised to register a robust compound annual growth rate (CAGR) of 13.5 percent during the forecast period, thereby accelerating the growth of the industrial packaging market in the Asia Pacific region.

Key Market Players

WERIT Kunststoffwerke W. Schneider GmbH & Co.

Mondi PLC

Greif Inc.

Global-Pak, Inc.

Berry Global Inc.

Smurfit Kappa Group PLC

Tank Holding Corp.

SCH?TZ GmbH & Co. KGaA

Amcor PLC

Snyder Industries LLC

Report Scope:

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

Industrial Packaging Market, By Pack Type:

Drums

Pails

IBCS

Sacks

Others

Industrial Packaging Market, By Application:

Chemical & Pharmaceuticals

Oil & Lubricants

Building & Construction

Food & Beverage

Automotive

Others

Industrial Packaging 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

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Industrial Packaging Market.

Available Customizations:

Global Industrial Packaging Market report with the given market data, Tech Sci 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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