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Flexible Packaging Market Research Report - Global Forecast till 2030

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Description:

Global Flexible Packaging Market Overview

Flexible Packaging Market Size was valued at USD 150.04 billion in 2021. The Flexible Packaging industry is projected to grow from USD 157.40 Billion in 2022 to USD 230.78 billion by 2030, exhibiting a compound annual growth rate (CAGR) of 4.9% during the forecast period (2022 - 2030). Increasing growth is primarily driven by the growing demand for packaged food coupled with the convenience of use and cost effectiveness of flexible packaging.

Flexible Packaging Market Overview

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

Flexible Packaging Market Trends

- Increasing Consumer Focus on Convenience and Sustainability Drives the Demand for Flexible Packaging

The growing consumer preference for convenience products is one of the key factors driving the growth of the flexible packaging market. Consumer preferences are changing as a result of busy lifestyles and smaller household units, requiring products that are simple to open, store, use, carry, and dispose of, and that cater to their on-the-go lifestyles. As a result, product packaging that complements the modern lifestyle is becoming more popular. On-the-go options for a wide range of products can be used with convenient packaging. Convenient packaging isn't just for food and beverages anymore; it's also being used for everything from healthy products to supplement fit lifestyle choices to prescription and personal care items. Consumers value packaging convenience as a major purchasing motivator. It influences their behavior by influencing their preference for a particular type or design of packaging.

Flexible packaging products such as boil-in-the-bag, bake-in-the-carton, mix-in-the-pouch, and serve-from-the-tray are major examples of flexible packaging products that provide the convenience that consumers require. Consumer packaged goods companies are responding to this demand by developing more small-sized snacking options. Thus, changing consumer lifestyles and consumption habits will drive the adoption of flexible packaging in a variety of end user industries, including food and beverages, pharmaceuticals, and home and personal care.

Furthermore, the country's high market penetration of ready-to-eat meals due to a busy lifestyle and a high number of working-class professionals is expected to contribute to the growth of flexible packaging during the forecast period. Flexible packaging is frequently used to package food products such as smoothies, snacks, dairy, and others. The packaged food market has been growing ly as a result of advancements in food processing techniques and changes in consumer lifestyles, which are expected to fuel product demand during the forecast period.

Additionally, according to the Flexible Packaging Association (FPA), the provides a wealth of information to its members through focused services and benefits of membership including such as Promotion of the flexible packaging industry by highlighting the benefits, contributions and advantages of the flexible packaging industry and its products through numerous domestic, international and FPA publications, industry trade shows, and industry recognition events and programs, Collection, analysis and publication of financial and economic data, in addition to legal, personnel, statistical and manufacturing information about the flexible packaging industry and Protection of the flexible packaging industry by proactively representing it before various government and regulatory.

However, to cater the demand there has been significant advances in the cost-effective innovations. For instance, people are choosing to eat prepared meals that are served in flexible packaging and pouches due to growing urbanization, busy work schedules, and the need to arrive on time is another factor driving the growth of the Flexible Packaging market revenue.

Flexible Packaging Market Segment Insights

Flexible Packaging Material Insights

The Flexible Packaging market segmentation, based on material, includes Plastic, Paper, Aluminum Foil and others. The Plastic segment holds a large number of shares in the market because of owing to its distinctive attributes such as flexibility, sustainability, and lightweight; highly economical and can be used by all industries irrespective of their scale of operations; and ease of reuse and recyclability in respect to the Flexible Packaging market revenue. Furthermore, rising use of biodegradable plastics due to increased consumer awareness of eco-friendly products; and changing lifestyles and eating habits have led to increased demand for packaged fast foods, driving the adoption of plastic in food packaging. Furthermore, biodegradability, the ability to survive in hot and cold temperatures without compromising the integrity of the food inside, and the durability provided by plastic packaging allow manufacturers to print eye-catching, high-quality custom designs, increasing product visibility in a retail setting. Furthermore, rising income levels and an increase in middle-class population will fuel demand for flexible plastic packaging.

September 2022: Amcor plc developed flexible retort pouches, which are made using its AmLite HeatFlex Recyclable solution. These flexible retort pouches are recyclable. This move further expanded sustainable packaging offering of the company. Moreover, major companies are expected to shift manufacturing base to developing countries including China and India on account of low production and labor costs.

January 2022: Huhtamaki Oy acquired full ownership of its Polish joint venture firm, Huhtamaki Smith Anderson sp. z o.o, from Smith Anderson Group Ltd.

Flexible Packaging Product Type Insights

The Flexible Packaging market segmentation, based on Product Type, includes Pouches, Bags, Wraps and others. The Pouches segment dominated the market in 2021 and is projected to be the faster-growing segment during the forecast period, 2022-2030. This is due to the rising demand for lighter and convenient packaging solutions in packaging industry is expected to provide good growth to the market growth during the forecast period. With flexible pouches and bags providing unparalleled benefits in this regard along with innovative packaging, it is increasingly being used in cosmetics industry, benefitting market growth. Hence, rising applications of pouches product type implants for Flexible Packaging positively impacts the market growth.

June 23, 2023: LyondellBasell and AFA Nord Partner to Recycle Flexible Secondary Packaging Waste. The joint venture company plans to build a mechanical recycling plant in Northern Germany to turn LLDPE and LDPE waste into quality recycled plastic materials for use in flexible packaging.
August 2022: Amor Limited opened an innovation center in China that with growth the opportunity for Flexible Packaging industry.

August 2022: Amor Limited acquired DG Pack, which is currently known as Amor Flexibles CZ Prostějov, a world-class flexible packaging plant.

Flexible Packaging Printing Technology Insights

The Flexible Packaging market segmentation, based on Printing Technology, includes Flexography, Digital Printing and others. The Flexography segment dominated the market in 2021 and is projected to be the faster-growing segment during the forecast period, 2022-2030. This is due to the brands promoting products as diverse as food, wine, motor oil, and grass seed. Flex now offers advantages that are highly appealing to both product marketing and purchasing management, thanks to newly discovered abilities to produce high-quality images and graphics, deliver high consistency and repeatability from job to job, and enable quick, cost-effective changeovers that support small-quantity runs. As more market segments reap the benefits of flexographic printing, its popularity is expected to skyrocket. Hence, rising applications of flexography Printing Technology for Flexible Packaging positively impacts the market growth.

Figure 2: Flexible Packaging Market, by Application, 2021 & 2030

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

Additionally, Flexographic printing is a modern printing technique that uses a flexible printing plate connected to a plate cylinder to create raised images on a variety of materials. The ink is transferred to the substrate by rapidly rotating the flexible inked plate. Flexographic printing is used to produce large quantities of labels and packaging.

Flexible Packaging Application Insights

Based on Application, the Flexible Packaging industry has been segmented into Food & Beverage, Pharmaceutical, Personal Care and others. Food & Beverage held the largest segment share in 2021, mainly Growth in demand for snack and convenience foods in small or single serving portions, increased spending on bakery and cereal bars, ready to cook meals and coffee or hot chocolate sticks and pouches, dehydrated and instant food snack foods & nuts, spice foods, chocolates & sweets, ice-cream novelties, and others. This will positively impact the growth of the flexible packaging market. The product's significant use for food and beverage packaging due to its sustainability, lightweight, cost-effectiveness, and non-fragile nature contributes to a high market share during the forecast period. Flexible packaging manufacturers will have significant opportunities in the coming years as a result of the increasing snackification trend, which is characterized by a busy lifestyle and the convenience of consumption provided. Because of the ease of filling nitrogen to preserve color, flavor, and texture, pouches are becoming more popular for packaging these items.

The third fastest growing segment in the Flexible Packaging industry is Pharmaceutical. Furthermore, Medical paper pouches, printed zipper pouches and bags, and aluminum foil, among other materials, are used in the packaging of liquid and powder-based pharmaceutical drugs, gels, and syrups. Furthermore, to differentiate their products, retail pharmacies are increasingly incorporating branding activities on their packaging. To improve functionality and safety, packaging companies are increasingly focusing on the incorporation of dispensing mechanisms, administration aids, sustainable materials, tamper-evident properties, and counterfeiting measures. As a result, efforts by flexible packaging manufacturers to provide efficient products for the pharmaceutical industry are expected to boost product growth during the forecast period.

Flexible Packaging Regional Insights

By Region, the study segments the market into North America, Europe, Asia-Pacific and Rest of the World. Asia-Pacific Flexible Packaging market accounted for USD 58.51 billion in 2021 and is expected to exhibit an 2.78% CAGR during the study period. Countries of Asia Pacific including China and India are further expected to offer potential growth opportunities for market players due to growing organized retail and e-commerce sectors coupled with ease in availability of raw materials. Growing spending power in China, India, and Indonesia is expected to boost the demand for packaged food products, which in turn will drive market growth. Furthermore, flexible packaging is expected to be in high demand in the region due to the growing consumption of packaged beverages and the preference for small-sized packs due to their affordability and convenience. According to Flexible Packaging Association, more than 46% of Americans are willing to pay more for flexible packaging that stores food and beverages owing to its sustainability profile. Furthermore, increasing preference for flexible packaging by manufacturers due to marketing advantages is expected to favor the product demand in the region.

Further, the major countries studied are: The U.S, Russia, Germany, China, Japan, India, Australia, South Korea, and Brazil.

Figure 3: FLEXIBLE PACKAGING MARKET SHARE BY REGION 2021 (%)

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

North America Flexible Packaging market accounts for the second-largest market share due to increasing advancements in the packaging technology and the popularity of flexible packaging among consumers have catalyzed its demand in the region. Moreover, it is a cost-effective alternative to storage issues which minimizes product wastes along with keeping the food safe and healthy. Other factors that are driving the market growth include its customizing ability, safety assurance, reusability, transparency and reliability. Further, the US Flexible Packaging market held the largest market share, and the Canada Flexible Packaging market was the fastest growing market in the North America region

The Europe Flexible Packaging Market is expected to grow at a CAGR of 5.01% from 2022 to 2030 due to factors driving the growth of innovative and more sustainable, flexible packaging. Also, the increasing demand for customer-friendly packages and heightened product protection are expected to drive the market's growth in Europe. Moreover, Germany Flexible Packaging market held the largest market share, Germany is expected to have the largest share of the overall industry, followed by the United Kingdom and Spain. This rapid growth can be attributed to the general expansion of packaging needs in the Latin American region, which has resulted from the increased market entry of retail organizations that have expanded their product offerings. Retailers have benefited from more effective circulation and coordination as a result of greater vertical reconciliation. This enables the flexible packaging business sector to grow at a steady rate, benefiting the local retail industry, and the UK Flexible Packaging market was the fastest growing market in the Europe region.

For instance, UK Flexible Packaging market continuous growing urban population in the UK, altering patterns in lifestyle, including decreasing the amount of time spent on the preparation of meals, is leading to a shift toward more processed, easily packed, and pre-prepared foods and snacks, which is expected to propel the growth of the market studied. Also, the rise in demand for packaged foods, ready-to-eat foods, frozen foods, and luxury foods is also likely to increase the demand for flexible packaging solutions in the country, owing to its ability to extend the shelf life of such products. As a result, Europe is expected to grow at the fastest rate during the forecast period of 2022-2030.

Flexible Packaging Key Market Players & Competitive Insights

Major market players are spending a lot of money on R&D to increase their product lines, which will help the Flexible Packaging market grow even more. Market participants are also taking a range of strategic initiatives to grow their worldwide footprint, including new product launches, contractual agreements, mergers and acquisitions, increased investments, and collaboration with other organizations. Competitors in the Flexible Packaging industry must offer cost-effective items to expand and survive in an increasingly competitive and rising market environment.

One of the primary business strategies adopted by manufacturers in the Flexible Packaging industry to benefit clients and expand the Flexible Packaging market sector is to manufacture locally to reduce operating costs. In recent years, Flexible Packaging has provided electronics with some of the most significant benefits.

Because of the presence of both domestic and international players, the industry is highly fragmented. Companies in the industry specialize in customizing packaging products based on customer needs, as well as acquiring companies and developing new products to gain a competitive advantage in the market. Coveris, for example, developed a new cereal liner, Cereal+ liner, in June 2021, which will improve shelf life and packer performance. This liner is made of fully recyclable polyethylene and provides freshness, protection, and shelf life to dry food and cereals packed in bag-in-box packaging.

Furthermore, the major players have a significant market share and are focusing on expanding their customer base through strategic collaborative initiatives in order to increase their market share and profitability. Mid-size to smaller businesses are expanding their market presence in Europe by securing new contracts and entering new markets as technology advances and product innovations improve. Mondi and Reckitt launched paper-based packaging for Finish dishwasher tabs in October 2022. When fully implemented, the new packaging would cut plastic usage by 75% and eliminate over 2,000 tonnes of plastic per year. Furthermore, this action contributes to Reckitt's goal of halving the amount of virgin plastic in its packaging by 2030.

Key Companies in the Flexible Packaging market

include

- Clondalkin Group (Netherlands)
- Reynolds (New Zealand)
- Berry Inc. (US)
- Sealed Air Corporation (US)
- Sonoco Products Company (US)
- Mondi Group (Austria)
- CONSTANTIA (Austria)
- Amcor Limited (Australia)
- HUHTAMAKI Group (Finland)
- Coveris Holdings SA, among others

Flexible Packaging Industry Developments

October 2022: Mondi Group collaborated with renowned Norwegian pet food company Felleskjøpet to transition to recyclable high-barrier packaging for the relaunch of its premium Appetitt brand.

September 2022: Huhtamaki Oy invested in Emerald Technology Ventures AG's sustainable packaging fund, which focuses on cutting-edge sustainable packaging technologies.

June 2022: Constantia Flexibles and Plasthill Technical Films, a company of the Dutch Oerlemans Packaging Group, have partnered to bring Constantia Flexibles' proprietary technology, CompresSeal, to the market in Europe as part of Expansion.**June 19, 2023:** CCL Industries Acquires Pouch Partners in Expansion of Flexible Packaging Portfolio. Pouch Partners supplies highly-specialized, gravure printed & laminated, flexible film materials for pouch forming, including recyclable solutions.**June 2023:**The recently introduced plastic taxes in Europe are aimed at encouraging the industry to use recycled material as the best end-of-life option. Recycling does give other challenges e.g. food compliance.

Flexible Packaging Market Segmentation

Flexible Packaging Material Outlook

- Plastic
- Paper
- Aluminum Foil
- others

Flexible Packaging Product Type Outlook

-

Pouches

- Bags
- Wraps
- others

Flexible Packaging Printing Technology Outlook

- Flexography
- Digital Printing
- Others

Flexible Packaging Application Outlook

- Food & Beverage
- Pharmaceutical
- Personal Care
- others

Flexible Packaging Regional Outlook

- North America
 - US
 - Canada
- Europe
 - Germany
 - France
 - UK
 - Italy
 -

- Spain
- Rest of Europe
- Asia-Pacific
 - China
 - Japan
 - India
 - Australia
 - South Korea
 - Australia
 - Rest of Asia-Pacific
- Rest of the World
 - Middle East
 - Africa
 - Latin America

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