

Industrial Sacks Market - Global Outlook & Forecast 2024-2029

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Report description:

The global industrial sacks market is expected to grow at a CAGR of 4.18% from 2023 to 2029.

MARKET TRENDS & DRIVERS

Increased Focus on Sustainable Packaging

The environmental impact of plastic as a packaging material is high as plastic packaging accounts for a high share of the overall industrial sack packaging market. The pressure on food & beverages (F&B), consumer goods, and pharmaceutical companies to reduce dependency on plastic is rising, and the same applies to packaging vendors. Sustainability is not limited to materials but extends to the production process, logistics, functionality, and end-user of expired products. Both buyers and suppliers of industrial sack packaging products seek to make a positive impact on the environment. By 2030, the European Commission has confirmed that all plastic-based packaging will be recyclable or reusable. Currently, only around 30% of the plastic waste generated in Europe is collected to be recycled. These factors will help boost the sustainable industrial sacks market in the future.

Innovative Offerings Boost Industrial Sack Demands

Innovation has been and continues to be a key growth driver in the global industrial sacks market. With the changing market dynamics, sack manufacturers have witnessed a significant transformation in how sacks are delivered to customers. By ranging from varying customer needs to diverse geographic regulatory environments, the global industrial sacks market has witnessed considerable modifications in its product offerings. The need to innovate has become a necessity for vendors catering to the global industry. Several vendors launched innovative industrial sacks to meet the growing market demand. These innovations blend paper sacks, woven polypropylene (PP) laminated, and plastic sacks. Major global industrial sacks market vendors, such as Mondi PLC and BillerudKorsnas, made significant innovative contributions through their creative sack products.

INDUSTRY CONSTRAINTS

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High Risks of Unfavorable Exposure to Products in Sacks

A crucial point to consider for packaging companies when selecting packaging is the material's durability when exposed to unfavorable conditions. Poor packaging often leads to damages and losses, and the replacement cost is always significant. Industrial sack manufacturers must consider the product for which the packaging is being made and the conditions to which it could be exposed. Global warming is another crucial factor often resulting in unexpected rains and hailstorms across regions. The unfavorable exposure of packaged products to rain, extreme climatic conditions, prolonged transportation, and unpredictable outdoor conditions could often damage goods before they reach the end of the supply chain. This unfavorable exposure is a prime restraint for the global industrial sacks market.

SEGMENTATION INSIGHTS

INSIGHTS BY SACK TYPE

The global industrial sacks market by sack types is segmented into WPP non-laminated, paper sacks, WPP laminated, FFS sacks, and other plastic sacks. The WPP non-laminated sack segment accounted for the largest share in 2023. These sacks are expected to remain two of the most significant segments of the global industrial sacks market until 2024 due to their demand and application advantages in end-user industries. Woven polypropylene (WPP) non-laminated sacks have acquired a lot of popularity in the industry over the years. More people are becoming familiar with PP/high-density polyethylene (HDPE) woven fabric and sacks. WPP non-laminated sack is made from polypropylene resin.

WPP non-laminated sacks have significant features and attributes. Woven polypropylene non-laminated sacks are 100% reusable, making them environmentally friendly; they are durable, lightweight, and flexible. They have higher strength than plastic sacks. WPP sacks can accommodate bulky items easily. All these factors propel the demand for polypropylene woven non-laminated sacks in the industrial sack market. Furthermore, the popularity of fast-moving consumer goods (FMCG) has increased retail outlets, pushing the demand for WPP non-laminated sacks. Moreover, the sale of WPP sacks is strongly fuelled by the ban on thin-film plastic bags.

Segmentation by Sack Types

- WPP Non-laminated Sacks
- Paper Sacks
- WPP Laminated Sacks
- FFS Sacks
- Other Plastic Sacks

INSIGHTS BY PRODUCT TYPE

The sewn open-mouth product type segment dominated the global industrial sacks market share in 2023. Sewn open-mouth (SOM) and multi-wallpaper sacks are industrial packaging bags or sacks designed to package various dry-flowable products. The industry growth can be attributed to the growing demand for SOM bags due to transport, packaging, and other global applications. The SOM bags industry is undergoing significant growth and is expected to continue growing in the foreseeable future. Several influences, including rising industrialization, construction activities, and the growing demand for sustainable industrial packaging solutions, drive the market growth.

Furthermore, the growth of modern trade formats, such as hypermarkets and supermarkets, coupled with the growth in urbanization and disposable incomes, has resulted in the growing demand for industrial-sewn open-mouth sacks for packaging consumer goods.

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Segmentation by Product Type

- Sewn Open Mouth
- Pasted Valve
- Gusseted Sacks
- Pinch Bottom Open Mouth
- Other Sack Type

INSIGHTS BY END-USERS

The global industrial sacks market by end users is segmented into building & construction, food & beverages, chemicals & fertilizers, retail, animal feed, and others. Regarding value, the building & construction segment dominated the industry with a share of over 35% in 2023. The building & construction segment is set to drive the demand for industrial sacks during the forecast period. The construction sector is expected to grow rapidly with rapid urbanization and significant infrastructure investments supporting this trend. This rise in construction activities is bound to push the demand for cement, which is the key product in this sector. The growing demand for cement will boost cement production across geographies, thereby boosting the production of cement packaging sacks. Vendors of industrial sacks will have ample growth opportunities in this sector worldwide.

Segmentation by End Users

- Building & Construction
- Food & Beverages
- Chemicals & Fertilizers
- Retail
- Animal Feed
- Others

GEOGRAPHICAL ANALYSIS

The global industrial sacks market is directly influenced by regional-level industrial application performances that directly correlate to the region's economic environment. In addition, government regulations play an important role in boosting sales of industrial sacks. Furthermore, APAC holds the most prominent share of the global industrial sacks market by value and volume in 2023. High domestic demand and the disposal of low-cost labor make the APAC region the most attractive industry for industrial sack producers. Hence, industry players focus on this region to gain a large share and increase profitability.

In APAC, differentiation is the key factor, as the packaging market and end-user industries are highly fragmented. Being a vast geography including China and India, supply chain challenges exist in procuring raw materials. Brand owners in India and China prefer packaging companies with the least supply chain risk (diversified procurement). APAC has demand for both low-cost sachets and premium luxury packaging. The demand for industrial sacks packaging in the food and industrial secondary/tertiary packaging is expected to fuel market growth during the forecast period.

Segmentation by Geography

- APAC
 - o□China
 - o□India
 - o□Japan

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- o□Australia
- Europe
- o□Germany
- o□The U.K.
- o□France
- o□Italy
- o□Spain
- o□Benelux
- North America
- o□The U.S.
- o□Canada
- Middle East & Africa
- o□Saudi Arabia
- o□UAE
- o□South Africa
- o□Turkey
- Latin America
- o□Brazil
- o□Mexico
- o□Argentina
- o□Chile

COMPETITIVE LANDSCAPE

Small and medium enterprises dominate a vast global industrial sacks market segment. Prominent players aggressively adopt an inorganic growth strategy to expand their operations in many regions. They have technological strength and high-volume product lines that help offset cost variations. Small companies focus on customization, as the competition in the market is predominantly based on two aspects: price and features. The niche segment that does not have a large volume depends on small packaging companies. Moreover, many new companies emerged in APAC as the e-commerce industry increased the demand for industrial sacks.

Key Company Profiles

- Berry Global
- BillerudKorsnas
- Mondi
- Segezha Group
- Smurfit Kappa
- Sonoco
- Westrock

Other Prominent Vendors

- Amcor
- Al-Tawfiq
- American Packaging Corporation
- Bischof+Klein

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- []ProAmpac
- []Huhtamaki
- []International Paper
- []ITP
- []Palmetto Industries International Inc.
- []Southern Packaging, LP
- []United Bags, Inc.
- []Nilay Paper Products
- []SHU Packaging Co., Ltd
- []RKW Group
- []Global-Pak
- []Polypack Packaging
- []Walki Group
- []Ringmetall SE
- []El Dorado Packaging
- []DS Smith
- []E.I. Du Pont de Nemours & Co
- []Emmbi Industries
- []Hood Packaging
- []INDEVCO
- []Knack Polymers
- []LC Packaging
- []Maruti Bulk Packaging
- []Muscat Polymers
- []Nampak Packaging
- []Nihon Matai
- []Oji Holdings
- []QTL Bags

KEY QUESTIONS ANSWERED:

- 1.[]How big is the industrial sacks market?
- 2.[]What is the growth rate of the global industrial sacks market?
- 3.[]Which region dominates the global industrial sacks market share?
- 4.[]What are the significant trends in the industrial sacks market?
- 5.[]Who are the key players in the global industrial sacks market?

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23. APPENDIX

23.1. RESEARCH METHODOLOGY

23.2. RESEARCH PROCESS

23.3. REPORT ASSUMPTIONS & CAVEATS

23.3.1. KEY CAVEATS

23.3.2. CURRENCY CONVERSION

23.4. ABBREVIATIONS

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