

Brazil Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Brazil Packaging Market size is estimated at USD 36.98 billion in 2024, and is expected to reach USD 45.43 billion by 2029, growing at a CAGR of 4.20% during the forecast period (2024-2029).

Key Highlights

- The packaging industry has experienced consistent growth over the past few years, driven by changes in substrate choice, new market expansion, and ownership dynamics. However, sustainability and environmental concerns are becoming increasingly important, and innovations in paper, metal, glass, and plastic packaging are seeing growth in the market. The rise in consumption of non-recyclable plastic packaging has led to a greater need for easily recyclable and sustainable materials such as paper and board, recycled PET (rPET), and bioplastics.
- The preference for processed and packaged foods is also driving the packaging market due to changing lifestyles and economic growth. The shift of the population towards urban centers is the main reason for the increasing demand for processed food. The demand for flexible packaging is increasing due to its ability to increase the products' shelf life and sustainability. Eco-friendly packaging types such as reusable glass and plastic are also gaining popularity, and manufacturers are transitioning to recyclable packaging to meet consumer demands.
- The e-commerce industry in Brazil has seen significant growth due to the pandemic and changing consumer preferences. The expanding retail and e-commerce sectors, as well as the easy availability of raw materials, are expected to create future growth opportunities for market players in Brazil. The demand for packaged food, beverages, and other products is expected to increase, further fueling market expansion over the forecast period.
- The packaging industry is subject to strict regulations to ensure the safety and quality of packaged products and protect the environment. Brazil's food packaging regulatory structure primarily reflects its commitments to regional and international trading partners, with the National Health Surveillance Agency responsible for developing and enforcing regulations applicable to most

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types of packaged food products.

-Overall, the surge in demand for packaged products, driven by growing purchasing power, modern retail, urbanization, and increasing awareness about health and hygiene among consumers, is expected to create significant growth opportunities for the packaging industry post-COVID.

Brazil Packaging Market Trends

Paper and Paperboard to be the Fastest Growing Segment

- The expansion of the paper packaging market in Brazil is primarily driven by its advantages for the environment. Paper packaging is lightweight, biodegradable, and recyclable, making it an eco-friendly option. Additionally, it offers a flexible and economical way to transport, preserve, and protect a variety of products, which is crucial for the packaging industry's growth in the region.

- Brazil's paper and pulp sector is one of the country's most successful agricultural exports, ranking high on the list of nations that generate this kind of product. Cartons can be made from various materials such as paperboard, duplex, white kraft, recycled materials, or composite. Combistyle carton packaging was introduced in May 2022 by SIG, along with one of the largest milk producers in Brazil, Frimesa. These carton packs were showcased at APAS Show 2022, the biggest F&B trade show in the Americas, held in So Paulo, Brazil.

- The paper packaging market is segmented by type, including corrugated boxes, boxboard or paperboard cartons, paper bags, and sacks, and paper pouches. Corrugated boxes are stronger than ordinary cardboard boxes and provide reliable cushioning for goods during shipment and handling. Corrugated cardboard comes in various sizes, depending on its thickness and dimension.

- Brazil is one of South America's largest markets for corrugated cardboard. According to the estimates of the Brazilian Institute of Geography and Statistics, Brazil's production of sheets and corrugated cardboard packaging is expected to rise from USD 2.89 billion in 2018 to USD 3.18 billion in 2023.

- Another factor driving the growth of the paper packaging market in Brazil during the forecast period is the rising popularity of innovative packaging. Intelligent paper packaging is projected to boost demand for these products in Brazil throughout the projection period. This trend is expected to further enhance the market's growth, emphasizing the importance of sustainable and eco-friendly packaging.

Pharmaceutical to be the Fastest Growing Industry

- Brazil is one of the major contributors to market share in Latin America. The country is a mature pharmaceutical market in the region. The market in the country witnessed various product innovations, especially pharmaceutical packaging products owing to significant vendors across the country.

- Moreover, Brazil has the most significant healthcare market in Latin America, with 9.1% GDP healthcare expenditure. According to the International Trade Administration, there are around 6,642 hospitals, out of which 63% are private. In 2021, there were about 88,000 healthcare support services, 502,000 doctors, and 89,000 pharmacies.

- Further, according to the Brazilian Federation of Hospitals; National Health Confederation (Brazil); Ministry of Health (Brazil), the number of hospitals in Brazil reached 7,191 in 2022. Such growth in hospitals would increase the opportunities for pharmaceutical packaging vendors nationwide to serve the growing need for prescribed pharmaceuticals.

- According to Europharma, one of the prominent medicaments producers in Brazil, the Brazilian pharmaceutical sector is undergoing a significant transition. Brazil's pharmaceutical industry has matured and become relevant, with an increasing emphasis on innovation, as evidenced by the fact that 64% of the medications launched solely in Brazil in 2021 were from

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national pharmaceutical businesses.

- The Brazilian healthcare industry is price-driven, with domestically produced goods having a pricing advantage to sell to the government; businesses must comply with all sanitary registration standards, which is vital for quality. Foreign companies should consider cost-cutting measures and emphasize new technology advantages in marketing and promotional materials.
- The region's expanding pharmaceutical production, the increased availability of over-the-counter medicines, and significant investments made by local businesses all contribute to the enormous growth of the Brazilian pharmaceutical sector. These trends would lead to an upsurge in pharmaceutical packaging demand nationwide.

Brazil Packaging Industry Overview

The packaging industry in Brazil is characterized by fragmentation, with the presence of major players such as Westrock Company, ORBIS Corporation, Tetra Pak International SA, Sonoco Products Company, and others. These companies are increasingly focused on developing innovative and sustainable packaging solutions, which they achieve through investments and expansions.

In November 2022, Amcor announced a significant investment of USD 3 million in PulPac, a Swedish company that offers cutting-edge manufacturing technology for low-cost, high-performance fiber-based packaging. Amcor is just one of many key investors in a cross-industry coalition aimed at accelerating the global adoption of PulPac's innovative technology.

In September 2022, Nefab introduced WoodFoam, an eco-friendly fiber-based recyclable foam, developed in collaboration with StoraEnso, a leading provider of renewable materials for packaging. This new solution represents a significant step forward in sustainable packaging and is likely to be embraced by environmentally conscious consumers.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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