

E-commerce Plastic Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The e-commerce plastic packaging market size is expected to grow from USD 26.97 billion in 2024 to USD 50.69 billion by 2029, at a CAGR of 13.46% during the forecast period (2024-2029).

Key Highlights

- The market, in terms of volume, is estimated at 1.992 million tons in 2024 and is expected to reach 3.420 million tons by 2029, registering a CAGR of 11.42% over the same forecast period.
- Packaging and labeling directly impact the sales and profits of a business, and user convenience during handling and logistics. Plastic has been one of the critical materials used in e-commerce packaging.
- Packaging and labeling directly impact the sales and profits of a business. E-commerce packaging consists of various packaging solutions made from materials used for content protection, product density management, promotional tools, product identification, and user convenience during handling and logistics. Plastic has been one of the critical materials used in e-commerce packaging.
- Flexible packaging is an ideal format for e-commerce to withstand more touchpoints throughout the shipment process. Moreover, flexible packaging material can prevent spills, resist breakage, and hold products together. Compared to conventional retail, e-commerce products are handled at least three times, according to Plastics Today. Flexible packaging also drives shipping cost efficiencies as the billable weight for a package is usually determined by whichever value is the greater, actual, or dimensional weight. Therefore, more space-efficient formats like flexible plastic packaging drive lower shipping prices and are hence most prevalent in the e-commerce sector.
- Moreover, flexible plastic packaging has presented difficulties with recycling because it is generally comprised of various layers that require to be separated to become feasible. Many market players are now working to develop more simple materials that can be easily recycled. The plastic packaging industry market players are developing mono-polymer flexible packaging laminates to

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ensure circularity while capitalizing on the many benefits of the flexible plastic packaging format.

-Plastic packaging can contain residues from substances used during the manufacturing process, such as solvents, along with non-intentionally added substances (NIAS), such as oligomers, impurities, or degradation products. There are increasing concerns over additives used to manufacture virgin plastics that complicate recycling or pose risks to human or ecological health. For manufacturers of recycled plastics, uncertainty about the presence of these additives in plastic waste can hinder recycling altogether. The lack of information and transparency regarding the use of additives in some plastic waste streams is thus a significant barrier to the increased recycling of those products and, in turn, to the market studied.

-The COVID-19 pandemic undoubtedly increased awareness about the flexible packaging of e-commerce products. The crisis fueled the online retail boom, significantly disrupting shopping and consumption habits, especially among the rural population who had hitherto been buying from retail stores. Furthermore, the Russia-Ukraine war had an immediate impact on the e-commerce packaging industry and the packaging industry as a whole by raising the prices of raw materials and affecting how businesses operated.

E-commerce Plastic Packaging Market Trends

Consumer Electronics and Media to Hold Significant Market Share

- Manufacturers of packaging products for consumer electronics are increasingly using protective packaging items, such as air bubble wraps, air pillows, and other inflated packaging products, to shield devices. It is anticipated that in the future, these packaging alternatives will satisfy the requirements of all electronic categories. The packaging of small consumer goods in blisters works effectively. This plastic packaging makes the items stand out and offers tamper protection while still being straightforward to open.

- Electronic product packaging that is environmentally friendly is growing in popularity. Regulators and government authorities have vigorously pushed for the use of green packaging. The necessity of protecting the environment from non-biodegradable packaging trash is being recognized by brands and consumers alike. For instance, in January 2023, Flipkart introduced an e-store for sustainable products. Flipkart stated that it hopes that through the implementation of this platform, the company will be able to make a difference and encourage informed buying decisions while being transparent, consumer-oriented, and eco-friendly.

- Plastics frequently allow producers to send more products with less packaging material when it comes to efficient packaging. Light-weighting can significantly improve the packaging for consumer goods' economic and environmental performance. Blister packaging is also perfect for small consumer electronics products. While still practical and simple to open, this style of plastic packaging highlights electronic accessories and offers tamper resistance. These qualities promote market expansion.

- Cell phones are usually packed and shipped using plastic material. Although many manufacturers are shifting toward sustainable packaging options, for example, Corrugated cardboard is often chosen when constructing custom boxes for Apple products; its durability and resistance to crushing make it an ideal choice for protecting iPhones on the way to market. However, using plastic films and wraps to package boxes is still the most preferred packaging choice.

- According to Ericsson, by 2028, the number of smartphone mobile network subscriptions is expected to exceed 7.7 billion. This is expected to boost the market significantly. The market is growing due to the rising demand for safe packaging for smartphones and their peripherals, including chargers, earbuds, and universal serial bus (USB) cables. Overall, plastic use in consumer electronics is increasing significantly all around the world, which is enhancing the market outlook. Consumer electronics frequently employ plastic wrapping to shield various electronic gadgets from internal and external dangers like inclement weather.

Asia Pacific to Register Major Growth

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- China is the largest e-commerce market globally, generating approximately 50% of the world's transactions. Alibaba's Taobao Tmall and JD.com are the domestic platforms that dominate the country's e-commerce market. Pinduoduo overtook dozens of competitors to become the third-largest platform, using a new group purchasing model. Other platforms, including Vipshop, Mogujie, Suning, Gome, Dangdang, Yihaodian, and JuMei, comprise the remaining market share, according to The eCommerce Guide.
- The e-commerce sector in China is experiencing rapid growth due to the growing preferences of consumers to shop online, the increasing availability of payment methods, and the promotion of online shopping events, such as one-day offers, attractive discounts, and improved logistics infrastructure.
- The e-commerce industry in India has changed the way business works in India. It has opened different types of commerce, such as business-to-business (B2B), consumer-to-consumer (C2C), direct-to-consumer (D2C), and consumer-to-business (C2B). Some of the major segments, like D2C and B2B, have seen tremendous growth in the last few years. The Indian market for D2C is estimated to be around USD 60 billion in FY27. This growth is fundamentally reshaping the packaging landscape as D2C companies increasingly rely on plastic packaging solutions to meet the demands of their online customers.
- Furthermore, according to the India Brand Equity Foundation (IBEF), the global e-commerce industry is estimated to be worth USD 350 billion by 2030. It is expected to grow at a CAGR of 21.5 % in 2022 to reach USD 74.8 billion by 2030. This surge in e-commerce activity directly translates into an increased need for efficient and sustainable plastic packaging solutions.
- The Japanese e-commerce market is undergoing a major transformation as Japanese consumers transition from traditional physical stores to online e-commerce businesses. Japanese e-commerce companies are taking advantage of the region's high urban population, technologically advanced consumers, and developed economy further to expand their presence in the region's e-commerce market. The densely populated urban regions of Japan necessitate efficient and convenient e-commerce experiences. As the population of these areas continues to shift towards online shopping, there is an increasing demand for reliable and environmentally friendly packaging solutions to ensure the safe delivery of products to their doorstep.

E-commerce Plastic Packaging Industry Overview

The e-commerce plastic packaging market exhibits a moderate degree of fragmentation, with notable players such as Storopack Hans Reichenacker GmbH, Berry Global Inc., Sealed Air Corporation, Pregis LLC, Sonoco Products Company, and Amcor Group GmbH actively participating in the market. These companies are achieving sustainable competitive advantages by fostering innovation in design, technology, and application.

In September 2023, Sonoco Products Company successfully concluded the acquisition of the remaining portion of its equity stake in RTS Packaging LLC (RTS) from its joint venture partner, WestRock. This acquisition, totaling USD 330 million, also includes the acquisition of a WestRock paper mill located in Chattanooga, Tennessee. As a result, Sonoco has expanded its network, now encompassing 15 operations spread across the United States, Mexico, and South America.

In April 2023, Amcor announced an innovative partnership with Tyson Foods, a global leader in protein and food production. The objective of this collaboration is to introduce more sustainable packaging solutions for consumer products. This alliance leverages the expertise of both companies in the realm of sustainability and aims to create a groundbreaking, environmentally friendly packaging solution, setting a precedent in the industry.

Additional Benefits:

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

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