

Canada Flexible Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Canada Flexible Packaging Market size is worth USD 9.23 Billion in 2025, growing at an 7.94% CAGR and is forecast to hit USD 13.52 Billion by 2030.

Key Highlights

- One of the primary factors driving the growth of the Canadian flexible packaging market is the growing consumer inclination toward convenience products. Consumer tastes are changing due to hectic lifestyles and smaller home units, necessitating products that are easy to open, store, use, transport, and dispose of, as well as those that appeal to on-the-go lifestyles.
- The Canadian flexible packaging market is witnessing a trend of eco-friendly packaging types from consumers and manufacturers. More than 40 Canadian companies unveiled the Canada Plastics Pact, a plan to recycle or compost 50% of Canada's plastic packaging by 2025. Fiber-based flexible packaging is also gaining traction in the country and supporting a brand's effort to use more sustainable packaging. Certain flexible packaging has now been engineered to be more environmentally friendly.
- The recent municipal, provincial, and federal legislative actions in Canada were focused on single-use plastics. Following the approach in the EU 2018 Plastics Strategy, the Canadian government announced its intention to ban single-use plastics. The Canadian province of Ontario expanded the extended producer responsibility (EPR) scheme for paper packaging from covering half of the recycling cost to the full cost by 2023. The bill established a free program similar to Maine's that can be applied to packaging, printing, writing paper, and foodservice ware.
- The Canadian government is taking initiatives to promote plastic packaging in the country. Recently, Circular Plastics Taskforce received funding from the Ministry of Economy and Innovation (MEI) to support projects that optimize the recycling of all plastic packaging. The Taskforce received more than USD 399,904 from MEI for the start of the project's second phase.
- According to Statistics Canada, monthly sales of grocery stores in Canada hit a high of USD 7.66 billion during the pandemic,

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leading to an increase in the demand for flexible packaging. Flexible packaging benefitted because of increased concerns around hygiene and the protection it provides. Specific bans on plastic shopping bags were overturned, and fees were lifted due to the initial concerns that reusable alternatives could spread the virus.

- The Canadian government aims to reduce the environmental impact of primary food plastic packaging by eliminating unnecessary packaging and promoting circular design by 2035. It plans to sell 75% of fresh fruits and vegetables in bulk or plastic-free packaging by 2026 and 95% by 2028. This pollution prevention plan is expected to challenge the flexible packaging market's growth. Strict requirements for large grocery retailers to reduce single-use packaging and prioritize reuse and recycling could decrease the demand for flexible plastic packaging materials.
- Flexible packaging products primarily use soft plastics from various polymers. Increasing awareness of the environmental impact of single-use plastics and unsustainable practices boosts the demand for eco-friendly products. Additionally, initiatives by companies to promote sustainable packaging are expected to reduce the demand for plastic packaging by adopting paper packaging.

Canada Flexible Packaging Market Trends

The Food Industry is Expected to Witness Significant Growth

- The Canadian food industry is a significant consumer of flexible packaging, driven by the increasing demand for convenient and small packaging solutions. The growing consumer preference for ready-to-eat products has led to a rise in demand for snacks and convenience foods in small or single-size portions. Additionally, there has been increased spending on short-run ready meals, coffee and hot chocolate sticks and pouches, dehydrated foods, snack foods, nuts, and bakery products. These products are major consumers of flexible packaging solutions.
- Statistics Canada reported a 1.7% increase in national food sales, marking the first growth since December 2023. Although modest, this increase was significant given Canada's growing population and persistent inflationary pressures. These factors are expected to drive food sales over time.
- Strict government regulations on food product safety and labeling made flexible packaging the preferred choice for printing and marketing. The Food and Drugs Act and Regulations, Division 23, Section B.23.001, govern the safety of all materials used in food packaging. The increasing number of product launches in the market also drives the adoption of flexible packaging. As food manufacturers invest more in innovative and informative packaging, the market's potential grows.
- According to Statistics Canada, the sales of snack food in Canada amounted to USD 334.99 million (CAD 454.09 million) in June 2023 compared to USD 271.72 million (CAD 368.32 million) in June 2022. This amounted to an increase of over 23.28% compared to the same month in 2022. Such growth in the sales of snacks is anticipated to drive the demand for flexible plastic packaging as it is mostly used for snack food packaging, providing opportunities for vendors to develop new products to cater to a wide range of customer needs and gain market share.

Paper Packaging is Expected to Hold a Significant Share

- The surge in e-commerce sales in Canada significantly boosted the demand for paper packaging. As online shopping becomes more prevalent, businesses need reliable and sustainable packaging solutions to protect products during shipping. Additionally, the growing emphasis on sustainable practices has led to increased demand for paper-based packaging materials over plastic alternatives. For instance, according to Statistics Canada, e-commerce retail sales in Canada reached a record of USD 2.73 billion (CAD 3.7 billion) in January 2024, with an increase of 7.1% compared to sales in January 2023. In January 2021, it reached a record high of USD 3.25 billion (CAD 4.4 billion).

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- In response to the growing demand for paper packaging across various end-user industries, vendors operating in the market are focusing on the supply of high-quality kraft paper. For instance, in July 2023, Mondi PLC agreed to acquire the Hinton Pulp mill, with a production capacity of 250,000 tonnes per annum, in Alberta, Canada, from West Fraser Timber Company Limited (West Fraser); it was completed in February 2024.
- Mondi plans to enter a long-term partnership with West Fraser to access local, high-quality fiber from a well-established wood basket. Subject to pre-engineering and permitting, Mondi plans to invest EUR 400 million in expanding Hinton. This expansion would primarily focus on a new kraft paper machine with a capacity of 200,000 tonnes per annum, expected to be operational in the latter half of 2027. By acquiring the mill and investing in the paper machine, Mondi aims to fully integrate its operations in the Americas and secure a long-term supply of high-quality, cost-competitive kraft paper for its network of 10 paper bag plants in the region, positioning Mondi to better support the growing demand for industrial and mailer bags.
- The foodservice industry in Canada is growing rapidly, driven by changing consumer behaviors and new food trends. The increasing frequency of online food orders is further boosting the demand for paper packaging solutions in the Canadian market. For instance, according to DoorDash Canada's annual Online Ordering Trends Report, 20% of consumers increased their takeout orders compared to 2023, while 18% ordered more deliveries. Furthermore, 33% of consumers reported placing repeat orders at least once a week.

Canada Flexible Packaging Industry Overview

The Canadian flexible packaging market is consolidated due to the presence of global and domestic players competing. The market is also characterized by larger companies seeking to expand their market share through strategic initiatives, such as product innovations, mergers, and acquisitions, to expand their product offerings and market reach and stay competitive. Some of the major players operating in the market are Amcor PLC, Mondi PLC, Berry Global Inc., American Packaging Corporation, and Sealed Air Corporation.

Additional Benefits:

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

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