

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

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Report description:

The Chemical Packaging Market is expected to register a CAGR of 3.23% during the forecast period.

Key Highlights

- The increasing sales of chemicals are anticipated to stimulate the need for chemical packaging through traditional and online retailers globally. Additionally, due to their ability to be repaired or reused, the rising demand for drums and intermediate bulk containers (IBCs) in chemical packaging is anticipated to expand the market.
- Moreover, various regions are focusing on imposing stringent regulations for chemical packaging. The ADR European Agreement considering the International Carriage of Dangerous Goods expresses the importance of choosing the right packaging for dangerous goods in its provisions on such packaging, stating that IBCs and large packaging should not be harmed or significantly weakened by such dangerous goods and should not catalyze a reaction. As awareness of the environmental and health effects of commonly used chemicals in packaging, such as bisphenol-A (BPA) and per- and polyfluoroalkyl substances (PFAS), grows, the European Union and the United States are expected to enforce stricter regulations in the upcoming years. This drives the requirement for robust packaging solutions in the chemicals sector of the region.
- Several new packages satisfy the safety concerns and provide a greener footprint. Traditionally, many chemical manufacturers have used pails and drums to transport their products. While these products have several benefits over competitive materials, new products satisfy a significant market sustainability gap. For instance, bag-in-box and industrial bulk containers allow for more product-per-package and are collapsible, reducing landfill space and transportation costs.
- Intermediate bulk containers (IBCs), which are an alternative to drums, are particularly well suited to the chemical industry because they can safely transport a variety of solid or liquid products, including those that require safe handling as well as those that are classified as hazardous, like classes 3, 4, 5, and 9, as well as other chemicals, like edible liquids, lubricating, and essential oils.

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- The market is expanding due to growing public knowledge of the advantages of chemical packaging, which lowers the risk of deaths and asset damage from chemical leaks. Rapid urbanization, globalization, and modernization are additional elements that promote growth.
- However, changing regulatory standards, fluctuations in raw material costs, growing waste levels, and increasing environment wastage regulations are expected to hamper some chemical packaging products' market growth.
- According to the American Chemistry Council, basic chemicals, including organic chemicals, inorganics chemicals, plastic resins, synthetic rubber, and manufactured fibers, witnessed a global production increase of 1.4% during the initial phases of the pandemic and have not seen a substantial impact due to COVID-19. However, the production of specialty chemicals took a significant hit as the global output declined by 11.2%, and especially for specialty chemicals, such as coatings, the show fell by 25.2% during the first wave of the pandemic, which negatively affected the usage of packaging in the specialty chemicals segment.

Chemical Packaging Market Trends

Material Advancements have Led to Lighter Weight Alternatives and Use of Sustainable Products

- Paper and biodegradable sacks are preferred over plastic sacks or bags due to the increasing concern over plastic packaging waste generated worldwide. The circumstances have led to governments adapting to alternative sources such as biodegradable packaging. The United States accounts for only 4% of the world's population and generates 2% of global Municipality Solid Waste (MSW). It is also stated that the United States produces about 106.2 kg of plastic waste per person per year.
- In some regions, COVID stimulated companies from various industries to bring back single-use plastic bags rather than accept reusable ones, mainly due to single-use plastics' ability to reduce the risk of potential viral transmission. Hence, an increasing number of chemical companies have suspended reusable containers, and states have begun to rescind plastic bag bans temporarily.
- The rapid shift toward sustainable packaging solutions further stimulates sack providers to innovate and provide recyclable or sustainable sacks for industrial purposes. For instance, ExxonMobil offers a range of performance PE polymers, including Exceed XP and ExxonMobil HDPE, among other products, to create several opportunities for differentiated, sustainable, heavy-duty sack solutions.
- Furthermore, Poland can be called a significant country in the chemical industry in Central and Eastern Europe. According to the Central Statistical Office, the chemical sector in Poland employs around 300,000 people, which accounts for 11% of employment in the entire industry within Poland. The most significant breakthrough in developing the chemical industry in Poland, which awaits the country in the coming years, is the development of refining, petrochemical, and plastics processing industries. Such a trend may lead to more demand for bags and sacks.
- Moreover, according to the Central Statistical Office of Poland, last year, the production of paper bags and sacks was valued at around 162,000 metric tons, a 4.52% rise in the output from the previous year, which was valued at about 155,000 metric tons. The increasing production value indicates the preference for bags and sacks made of paper as a sustainable option.
- Concern over the environmental impact of products is an established phenomenon. There has been a revived interest in sustainability explicitly focused on packaging. It is reflected in central government and municipal regulations, consumer attitudes, and brand owner values communicated via packaging. As sustainability has become a key motivator for consumers, brands increasingly focus on packaging materials and designs that show their environmental commitment.

Asia Pacific to hold significant market share

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- The market will expand in the region due to rising industrial development, increasing foreign direct investment (FDI), and rising exchange rates. Additionally, several nations, like China and India, are concentrating more on manufacturing and consuming chemicals, increasing the demand for and consumption of chemical packaging materials in this region.
- The demand for steel drums and intermediate bulk containers (IBCs) in China is driven by increasing spending on trade activities and growing demand for chemical packaging. For instance, China's chemical industry has been the largest globally, given revenue generation. The sector has contributed to half of the growth of the world chemical market over the past two decades and has played an essential impetus in China's high economic growth.
- The growing incidents of storage and transportation of hazardous chemicals are further expected to foster the consumption of IBC and steel drums as they are perceived as safe packing solutions for such products. Additionally, the health risks posed by chemicals upon leakage and leaching, followed by the demand for a solution that prevents exposure to the external environment, continue to rise, driving the market's growth in the region.
- Moreover, with the landscape of the chemical industry changing globally, China is expected to drive its chemical industry to the next stage of development by taking the lead by leveraging technology innovation and trade and prevailing in the international market.

Chemical Packaging Industry Overview

The chemical packaging market is moderately competitive and consists of several global and regional players. These players account for a considerable market share and focus on expanding their client base worldwide. These players focus on R&D activities, strategic alliances, and other organic and inorganic growth strategies to stay in the market landscape over the forecast period.

In November 2022, Greif, Inc. entered into a binding agreement to acquire Lee Container Corporation, Inc., for a purchase price of USD 300 million, excluding tax benefits, with an estimated net present value of roughly USD 30 million. Lee Container Corporation, Inc. manufactures high-performance barrier and conventional blow-molded containers, primarily in the chemicals segment. The Lee purchase strengthens its dedication to expanding the jerrycan and small plastic bottle footprint and gives its company a new growth engine.

In August 2022, Mauser Packaging Solutions announced that the company continues expanding the number of items it can produce under the Infinity Series while investing in machinery and software that promote the circular economy. The business most recently invested in a new multi-layer plastic drum machine to facilitate the usage of recycled resin in the company's Infinity Series plastic drum product line.

Additional Benefits:

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

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