

Europe Active And Intelligent Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Europe Active And Intelligent Packaging Market size is worth USD 4.63 Billion in 2025, growing at an 5.04% CAGR and is forecast to hit USD 5.92 Billion by 2030.

Key Highlights

- Manufacturers are adopting a comprehensive approach to packaging in response to changing consumer preferences. Intelligent packaging market participants integrate technologies such as NFC chips, LEDs, and screens to provide additional functionalities that benefit consumers, healthcare professionals, manufacturers, and medical facilities.
- Intelligent packaging systems incorporate small, cost-effective smart devices, labels, or tags that acquire, store, and transfer information about the food's parameters, functions, and properties within the package.
- Government initiatives in Germany are significantly driving the intelligent packaging market. The Federal Ministry of Food and Agriculture's focus on reducing food waste has led to several initiatives promoting innovative packaging trends. According to the ministry, Germany generates approximately 12 million tonnes of food waste annually.
- Various programs have been implemented, including the National Strategy for Food Waste Reduction. This strategy aims to reduce food losses along production and supply chains, including post-harvest losses, and decrease per-capita food waste in Germany at retail and consumer levels by 2030.
- The European Commission and the German government are committed to the United Nations Sustainable Development Goal (SDG) target 12.3, which aims to reduce food waste along production chains and halve it at retail and consumer levels by 2030. These initiatives are expected to increase the deployment of active and intelligent packaging solutions in retail and other end-user industries, supporting the growth of the intelligent packaging market.
- The primary advantage of active and intelligent packaging is its ability to interact with the enclosed product, playing a dynamic role in preservation. The process tracks tagged information throughout the supply chain. Active packaging may alter food

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composition and organoleptic characteristics, provided the changes comply with food regulations.

- However, this packaging also raises contamination concerns, as plastic seepage into foods may lead to health complications. Due to limited awareness of its advantages, conventional customers are often uncomfortable with such packaging solutions. There have been genuine contamination cases, as plastics contain aromatic amines and other substances, including residual monomers and polymerization by-products, which can affect the food quality they contain.

Europe Active And Intelligent Packaging Market Trends

Healthcare Industry is Anticipated to Witness Significant Growth

- The healthcare industry faces numerous packaging challenges, including product regulations, stipulations, and instructions. Pharmaceutical packaging prioritizes tamper-proof and child-resistant designs. However, counterfeit operations can replicate these packaging features, creating the illusion of legitimate products.
- In Germany, healthcare device packaging is growing as hospitals focus more on the sterile and disinfected packaging of medical devices. Increased viral infections and stringent government safety regulations drive this trend.
- Rapid progress is being made in technologies enabling features such as sensors, radio-frequency identification (RFID), programmable alerts, electronic anti-tamper safeguards, and tracking systems. While costs are decreasing, developing its supply chain to facilitate larger-scale production is key to bringing active and intelligent packaging to market.
- The Centre for Process Innovation Limited (CPI) reports significant changes in the healthcare industry. Factors including longer life expectancies, an increase in chronic diseases, and a shift toward advanced and personalized therapies drive these changes. With more individuals taking multiple medicines, there is pressure on the National Health Service (NHS) to track drug distribution and patient adherence accurately. The industry is increasingly looking to technologies like active and intelligent packaging to address these challenges.
- Packaging can become intelligent and provide critical functionality by incorporating advanced features such as sensing and wireless communication. Beyond protecting the drug and providing information, this packaging can offer additional features as part of an IoT-enabled connected system.
- According to GOV.UK, the UK government's healthcare spending increased from USD 264.55 billion during 2022-2023 to USD 274.88 billion during 2023-2024. This increased expenditure could potentially contribute to the growth of the European active and intelligent packaging market by creating demand for innovative packaging solutions. These solutions aim to enhance medical product safety, traceability, and efficiency, reflecting a growing emphasis on healthcare and potentially driving advancements in packaging technologies to meet evolving industry needs.

The United Kingdom is Observing Notable Growth

- The UK active and intelligent packaging market is experiencing significant growth, driven primarily by the food, beverage, and pharmaceutical industries. The food and beverage sector, in particular, is adopting smart packaging solutions to extend the shelf life of frozen foods, which are gaining popularity nationwide.
- Consumer trends in the United Kingdom show an increasing willingness to spend more on high-quality food products, with a growing preference for healthier options. This shift has led to a rise in healthier food products on retail shelves, consequently boosting the demand for active and intelligent packaging in the food and beverage sector.
- A study by WRAP in the United Kingdom revealed that 60% of household food waste occurs due to consumers not using edible goods in time. The report also highlighted consumer interest in packaging that can maintain food freshness before and after opening and clearer on-pack messages about food storage.

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- Brands are increasingly adopting active and intelligent packaging solutions to meet consumer demands for interactive, smart, user-friendly, connected, and eco-friendly packaging. For example, Cadbury, a British multinational company, has implemented smart packaging to enhance customer connections, utilizing MAXQ QR codes on its milk tray packaging.
- Amazon's sales in the United Kingdom have shown substantial growth over the past decade, with net sales rising from approximately USD 17.5 billion in 2019 to nearly USD 33.6 billion in 2023. This surge in e-commerce sales has increased demand for packaging solutions. Active and intelligent packaging technologies, including RFID tags, sensors, and smart labels, have become increasingly important in ensuring safe and efficient product delivery in the e-commerce industry.

Europe Active And Intelligent Packaging Industry Overview

The European active and intelligent packaging market is semi-consolidated and consists of a few significant companies like Amcor Group GmbH, Honeywell International Inc., Crown Holdings Inc., and Ball Corporation. The companies continuously invest in strategic partnerships and product developments to gain market share.

- May 2024: Amcor launched its European Innovation Center in Belgium. This facility will collaborate with regional brands and retailers to develop packaging solutions that enhance consumer experience and environmental sustainability. The center aims to pioneer new material technologies, creating more sustainable and high-performing packaging designs. These innovations will strive to improve product visibility in retail environments and increase consumer user-friendliness.
- April 2024: Avery Dennison, a global materials science and digital identification solutions company, formed a partnership with Controlant, a specialist in pharmaceutical supply chain digital transformation. This collaboration aims to improve real-time, end-to-end visibility and support sustainability efforts in the pharmaceutical industry.

Additional Benefits:

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

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