

Europe Barrier Films - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Europe Barrier Films Market size is estimated at USD 7.80 billion in 2025, and is expected to reach USD 9.42 billion by 2030, at a CAGR of 3.84% during the forecast period (2025-2030).

The market size reflects the sale value of various packaging products, such as bags and pouches, stretch and shrink wrap films, tray lidding films, wrapping films and forming webs, and blister base films made from various material types. These products are consumed by different end-user industries across Europe, including pet food and food, beverage, pharmaceutical and medical, and home and personal care.

Key Highlights

- Films are one of the most popular choices for food packaging. Films are preferred to conventional materials for food packaging in terms of safety. This material is less susceptible to contamination and pilferage. It is easy to print information on films. Films have superior barrier properties, are lightweight, and can be recycled. The demand for barrier films in the pharmaceutical industry and expanding applications of barrier films in food and beverage packaging are expected to drive the growth of the barrier films market during the forecast period. Owing to the increasing barrier demands across various end-user industries, the market for barrier films in Europe is largely expanding due to the enormous demand for high-performance films. Barrier films are likely to be used more frequently in suitable applications and at lower costs due to advancements, notably in processing technology.
- Shrink films are predominantly used in the e-commerce sector for wrapping various products. The films offer various benefits, such as a wide range of oxygen transmission rates, optimal shelf-life for a variety of food packaging (meat, cheese, poultry, and case-ready packaging), premium product presentation, high impact, and puncture resistance, fewer leakers when packing rigid and sharp-edged products, retained strength at freezing temperatures and preserved package integrity. However, poor infrastructure facilities for recycling and fluctuations in barrier film raw material prices are expected to hinder the growth of the

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barrier films market during the forecast period. Also, stringent regulations and standards for the approval and marketing of barrier films are challenges inhibiting demand in the market.

- Aside from that, advances in barrier films provide adequate measurements at the low permeability levels needed for organic photovoltaics and OLEDs. Barrier films are intended to protect the product against moisture and oxygen deterioration. Europa has one of the largest cosmetics and personal care markets globally. Major countries, including the United Kingdom, Germany, France, Italy, Spain, and Poland, dominate the European personal care market.

- Barrier films are widely used in the packaging of personal care products to extend their shelf life, prevent breakage, and retain the active components without using additional preservatives. European manufacturers are creating high-barrier films, providing an oxygen barrier, a moisture barrier, and scent preservation to confined items.

- In the next five to ten years, European plastic recycling is anticipated to increase dramatically, especially in response to rising pressure from authorities and consumers. Targets to minimize waste and increase the circularity of the plastics value chain are being discussed and improved by governments and large brands constantly. This is expected to pose a challenge to the growth of the market studied.

- Europe's food and beverage industry has experienced significant growth and increased due to online sales over time since the start of the COVID-19 pandemic. People have been compelled to develop new ways to complete their daily tasks due to lockdowns and advisories to stay inside. The nations impacted most by the pandemic have witnessed the most significant increase.

- According to the research Voyado, the proportion of consumers who made their first-ever online grocery purchases during the pandemic was 30% in Spain, 22% in France, 20% in the United Kingdom and Italy, 14% in Sweden and Denmark, 11% in Finland, 10% in Poland, the Netherlands, Belgium, and Germany, and 9% in Norway. Also, 68% of new customers who bought groceries online confirmed that they would keep doing so in the future. This shift in people's habits has positively impacted the barrier films market.

Europe Barrier Films Market Trends

Food and Pet Food Markets to Register Significant Growth

- In the food industry, every product has unique qualities and packaging specifications. Therefore, food packaging should offer the proper environmental conditions from when food is packed until consumed. Every product has unique attributes and packaging needs in the food sector. Therefore, food packaging should offer the proper environmental conditions from when food is packaged until it is consumed. Barrier films have a flexible, solvent-free, impermeable co-extruded structure (single or several layers) that does not react with the packaged food. It also limits the migration of mineral oil and UV radiation and aids in preventing interaction with oxygen, carbon dioxide, or moisture. This rigid barrier, created using specialized materials, also maintains food characteristics, including color, taste, texture, aroma, and flavor.

- Barrier films are frequently used in Europe's food industries to increase shelf life and protect food goods from external effects by acting as moisture and oxygen barriers. New applications for food packaging have led to stricter specifications for food product packaging. A significant area that requires attention is better barrier films to build real packaging. In order to extend food's shelf life and lower the risk of food spoilage and damage, the packaging film's barrier characteristics must be improved. The packaging sheet can be coated with either a PVDC or aluminum coating to obtain superior barrier characteristics.

- According to Deutsches Tiefkühlinstitut, revenues from frozen food sales were approximately EUR 19.54 billion (USD 21.25 billion) in the previous year, up from EUR 15.92 billion (USD 17.31 billion) in the year before. As per the data, the revenue from the sales of frozen food has been gradually increasing during the past decade. This increasing trend is expected to remain in the forecast period, creating a huge opportunity to sell barrier films across the region.

- An increasing number of health-conscious pet owners want their pets to eat at par with them. Gluten-free and grain-free alternatives, sustainable sourcing, and premium gourmet ingredients that wouldn't look out of place on a fine-dining menu are some of the current trends in pet food. This poses an intriguing conundrum for pet food producers.

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- In European countries, a barrier film is often used for items such as baked goods, biscuits, frozen foods, seafood, chips and snacks, meat and dairy products, dry fruits, and pet food. The Europe barrier films market is expected to witness growth due to the growing food and pet food industries owing to the increasing demand for healthy, hygienic, lightweight, and eco-friendly packaging.

Germany to Hold Significant Market Share

- Germany is considered one of the immaculate locations for pharmaceutical R&D, sales, and production of medicines due to its cutting-edge innovation, long tradition as the world's pharmacy, and constantly increasing demand for healthcare products. Europe's largest pharmaceutical market is expanding faster than the German economy due to demographic change, increased chronic diseases, and a greater focus on prevention and self-medication.
- Flexible packaging, such as a pouch, is cost-effective and lightweight, providing convenience (zip-locks, re-sealable seals, and easy to carry) while ensuring freshness, especially in food products like bakery, confectionery, and dairy food. The growing demand for easy food options to grab, hold, eat, or carry is driving the demand for packaging pouches. To meet this demand, manufacturers are putting extra effort into making food packaging portable, which is expected to boost the demand in the barrier packaging sector in Germany.
- The demand for nutritious drinks and healthy food surged dramatically due to the COVID-19 pandemic. Most of these items come in plastic bags and pouches. Plastics are sturdy and lightweight, which increases their use in packing. Consumers like packaging that is portable and easy to handle; therefore, the demand for pouches in the packaging business has increased. Barrier packaging is becoming more popular in numerous industries due to its cost-effectiveness and increased shelf life.
- Jufico, a leading German baby-food producer, launched its organic brand FruchtBar in fully recyclable Monomaterial pouches without Aluminum (Pouch5) into the German market. The pouch was developed by Gualapack, the world leader of premade spouted pouches, and is the first premade spouted pouch available in high-barrier recyclable mono-material.
- The German population is open to new food trends and cultural influences. It is increasingly placing value on food quality, with health and well-being gaining importance as the population matures. This also creates new opportunities for pouch packaging, especially in the market.
- According to Statistisches Bundesamt, the German packaging sector earned over EUR 35 billion (USD 38.35 billion) in revenue in 2022, an increase from EUR 29.6 billion (USD 32.43 billion) over the previous year. As per the research report, the packaging industry in Germany witnessed growth in the past year.
- Germany is the biggest food and beverage market in the European Union. The food processing industry represents the third-largest industry in Germany. According to Statistisches Bundesamt, in 2008, German producers of food and animal feed generated revenues of roughly EUR 135.80 billion (USD 149.87 billion), and by 2021 this figure had increased to EUR 165.01 billion (USD 181.8 billion). All such factors are expected to boost the demand for barrier films in the region.

Europe Barrier Films Industry Overview

The European barrier films market is highly fragmented, with the presence of major players like Amcor, Mondi Group PLC, Berry Global, and Huhtamaki Oyj, among others, accompanied by several regional packaging firms. Players in the market adopt strategies such as partnerships, innovations, mergers, and acquisitions to enhance their product offerings and gain sustainable competitive advantage.

- March 2023: Amcor and Nfinite Nanotechnology Inc. launched a collaborative research initiative to test the application of Nfinite's nanocoating technology to improve both recyclable and biodegradable packaging.

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- December 2022: As part of its ongoing commitment to closing the loop on circular plastic recycling, Coveris launched a new business division called "ReCover," fully in line with its no-waste mission. ReCover will operate as a distinct business, providing Coveris locations with materials at an arms-length basis and supplying third-party customers looking for recycled materials of a caliber not already offered in the market.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET INSIGHTS

4.1 Market Overview

4.2 Industry Value Chain Analysis

4.3 Industry Attractiveness - Porter's Five Forces Analysis

4.3.1 Bargaining Power of Suppliers

4.3.2 Bargaining Power of Buyers

4.3.3 Threat of New Entrants

4.3.4 Threat of Substitute Products

4.3.5 Intensity of Competitive Rivalry

4.4 Assessment of the Impact of COVID-19 on the Industry

5 MARKET DYNAMICS

5.1 Market Drivers

5.1.1 Replacement of Rigid Packaging Formats

5.1.2 Increasing Biodegradable Barrier Films

5.2 Market Restraints

5.2.1 Environmental Legislation for Recycling

6 MARKET SEGMENTATION

6.1 By Packaging Product

6.1.1 Bags and Pouches

6.1.2 Stretch and Shrink Wrap Films

6.1.3 Tray Lidding Films

6.1.4 Wrapping Films and Forming Webs

6.1.5 Blister Base Films

6.2 By Material

6.2.1 Polyethylene

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- 6.2.2 BOPET
- 6.2.3 Polypropylene (CPP and BOPP)
- 6.2.4 Polyvinyl Chloride
- 6.2.5 Other Material (EVOH, Polystyrene (PS), and Nylon)
- 6.3 By End user Industry
 - 6.3.1 Food and Pet Food
 - 6.3.2 Beverages
 - 6.3.3 Pharmaceutical and Medical
 - 6.3.4 Personal and Home Care
 - 6.3.5 Other End-user Industries
- 6.4 By Country
 - 6.4.1 United Kingdom
 - 6.4.2 France
 - 6.4.3 Germany
 - 6.4.4 Italy
 - 6.4.5 Spain
 - 6.4.6 Rest of Europe

7 COMPETITIVE LANDSCAPE

- 7.1 Company Profiles
 - 7.1.1 Amcor PLC
 - 7.1.2 Coveris Holdings
 - 7.1.3 Mondi Group PLC
 - 7.1.4 Berry Global Group Inc.
 - 7.1.5 Huhtamaki Oyj
 - 7.1.6 Sealed Air Corporation
 - 7.1.7 Bak Ambalaj
 - 7.1.8 Constantia Flexibles
 - 7.1.9 Cellografica Gerosa SpA
 - 7.1.10 Wipak Oy (Wihuri Oy)
 - 7.1.11 Danaflex Group
 - 7.1.12 UFLEX Limited
 - 7.1.13 CDM Sp.z.o.o.
 - 7.1.14 adapa Holding GsembH
 - 7.1.15 Di Mauro Officine Grafiche SpA
 - 7.1.16 Sudpack Verpackungen
 - 7.1.17 Gualapack
 - 7.1.18 Toppan Inc.

8 INVESTMENT ANALYSIS

9 FUTURE OF THE MARKET

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