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

Market Report | 2025-04-28 | 108 pages | Mordor Intelligence

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Report description:

The Germany Packaging Industry size is worth USD 38.06 Billion in 2025, growing at an 4.23% CAGR and is forecast to hit USD 46.83 Billion by 2030.

Key Highlights
- In Germany, the surge of e-commerce has led to a heightened demand for packaging materials. In response, regional packaging companies are pivoting, providing cost-effective, secure, and lightweight solutions specifically designed for online retail.
- These offerings feature innovative designs that safeguard products during transit while optimizing material usage. To handle the uptick in online orders, these firms are channeling investments into cutting-edge automated packing technologies, including robotic systems and AI-driven sorting tools. Such automation not only streamlines operations but also guarantees uniformity in packaging quality.
- Germany's packaged food and personal care sectors are witnessing an escalating demand for smaller pack sizes, a trend poised to gain momentum in the coming years. This shift is attributed to factors like the rise of single-person households, a preference for resealable, on-the-go packaging, and best-before-date considerations.
- These dynamics amplify the need for packaging materials in items ranging from sauces and dressings to confectionery and processed fruits. In response, manufacturers are crafting innovative packaging solutions that prioritize product freshness, minimize waste, and enhance portion control.
- The need for flexible plastic packaging is on the rise, driven by its lightweight nature and adaptability. This trend is bolstered by the preference for compact, user-friendly packaging and design advancements. Flexible plastics not only extend shelf life and cut transportation costs but also bolster product protection. In light of environmental concerns, manufacturers are prioritizing the development of recyclable and biodegradable flexible plastic variants.
- There's a noticeable consumer shift towards eco-friendly packaging materials. Aluminum and glass are gaining traction in the

region, celebrated for their environmental benefits and recyclability. This trend underscores a broader movement away from traditional plastics.
- Additionally, the European Council has rolled out new EU-wide regulations targeting single-use plastics and setting ambitious recycling goals. These regulations are poised to influence the market landscape.

German Packaging Market Trends

Germany's Plastic Packaging Sector Navigates Growth Amidst Stricter Regulations

- Germany is increasingly adopting plastic packaging solutions, driven by advancements from solution suppliers and end users. The "Made in Germany" reputation has fostered a conducive environment for the region's plastic packaging companies. However, the German government has imposed stringent regulations on the plastic packaging industry. The German Packaging Law mandates that packaging be designed for recycling, emphasizing recyclability and using recyclable and renewable materials.
- Manufacturers are witnessing an expansion in the use of plastic bottles, with rising demand across various sectors. For instance, in June 2023, Coca-Cola Europacific Partners Germany activated an unused returnable PET line at its Bad Neuenahr facility. This line will bottle popular carbonated soft drinks, including Coca-Cola, Fanta, and Sprite, and reintroduce sugar-free variants.
- Soft drinks, especially carbonated ones, are primarily packaged in plastic bottles, especially polyethylene terephthalate (PET) bottles. As consumption rises, so does the demand for these plastic bottles, fueling growth in the plastic packaging sector. Data from the Economic Association of Non-Alcoholic Beverages (wafg) indicates that in 2023, the average German consumed approximately 124.5 litres of soft drinks, up from 114.7 litres in 2020.
- This growing consumption trend may lead to a pivot towards sustainable plastic packaging solutions, such as recycled materials or biodegradable plastics. Companies will likely invest in these innovations to align with consumer and regulatory demands for environmental responsibility.
- Plastic bottles and containers are favoured for personal care products like shampoos, conditioners, and lotions due to their cost-effectiveness, ease of handling, and resistance to breakage. Moreover, advancements in eco-friendly plastic materials, including recycled and biodegradable options, have alleviated sustainability concerns, making them more appealing to environmentally conscious consumers. For instance, in August 2024, Alpla Werke Alwin Lehner GmbH & Co KG and zerooo initiator SEA ME GmbH unveiled a reusable and fully recyclable PET bottle tailored for cosmetics and personal care products.

Germany's Packaging Industry is Driven by Food Trends and Environmental Concerns

- The food sector, bolstered by the persistent work-from-home trend, primarily drives Germany's packaging industry. Lightweight, cost-effective, and design-flexible, plastics dominate food packaging, making them ideal for easy product storage and use.
- While rigid plastic packaging boasts cost advantages for large-scale production, paper and cardboard packaging are rising in popularity, mentioned for their portability and convenience. These materials not only extend shelf life without refrigeration but also back environmental friendliness.
- As economies flourish, modern retail outlets, from supermarkets to convenience stores, are broadening their horizons, especially in frozen food offerings. This retail evolution accelerates the adoption of diverse packaging technologies in emerging markets, including shrink films, flexible bags, lidding films, high-barrier materials, thermoforming films, and skin films.
- In response to growing environmental concerns, major FMCG companies in Germany are ambitiously cutting down on plastic use in food packaging, pivoting towards eco-friendly materials, with paper-based packaging witnessing a notable surge.
- Ensuring safe delivery to consumers, food packaging plays a pivotal role. As demand rises for both functional and visually appealing packaging, companies in the food packaging sector are gearing up to meet these expectations.

- Ready meals, with their diverse packaging needs ranging from trays to pouches and boxes, are driving innovation in the packaging market. Manufacturers are actively developing varied solutions to cater to these demands.
- Data from Statistisches Bundesamt reveals a notable uptick in Germany's ready meals revenue, soaring from USD 4.39 million in 2021 to USD 6.35 million in 2023. This revenue surge, indicative of heightened sales volumes, directly correlates to an increased demand for packaging materials, as each ready meal necessitates its own packaging.

German Packaging Industry Overview

The fragmented German packaging market includes various global players with significant market presence. Key players encompass Amcor plc, Berry Global Inc., Mondi plc, O-I Germany GmbH & Co. KG (a subsidiary of Owens-Illinois Inc.), Smurfit WestRock plc, and Ball Corporation, among others. The German packaging industry has consistently witnessed trends such as product launches, acquisitions, and collaborations among businesses and their units, all aimed at strategic growth.

- November 2024: Mondi plc has inaugurated an innovative hub in Germany, aimed at co-creating the future of flexible packaging solutions. These experiential studios are designed for Mondi's customers to engage directly in the innovation process. This hands-on involvement allows them to leverage the company's vast expertise, cutting-edge technology, and commitment to driving sustainable change in the flexible packaging sector. By consolidating pilot lines, testing capabilities, and collaborative spaces, Mondi is poised to accelerate the market introduction of its new packaging and paper solutions.
- October 2024: Ardagh Glass Packaging-Europe (AGP-Europe), a division of Ardagh Group S.A., has unveiled a new lightweight range of standard wine bottles. Manufactured in Germany, these bottles cater specifically to the European market. Notably, the bottles have undergone a weight reduction from 410g to 360g. This achievement was made possible by incorporating a high recycled glass cullet level of up to 80%, resulting in a commendable 12% decrease in carbon emissions for each bottle produced.

Additional Benefits:

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

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