

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

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Report description:

The India BOPP Films Market size is worth USD 5.78 Billion in 2025, growing at an 5% CAGR and is forecast to hit USD 7.37 Billion by 2030.

Key Highlights

- Biaxially oriented polypropylene (BOPP) film is a robust material frequently utilized for packaging bird seed, pet food, deer corn, and animal nutrition products. Its strength and capacity to support weight without easily breaking make it the preferred choice for packaging rice and minerals. Present trends indicate a movement toward sustainable packaging solutions, advancements in barrier properties to enhance shelf life, adjustments to meet e-commerce packaging requirements, and the investigation of bio-based materials.
- The market trend is expected to strengthen in the coming years, as BOPP films offer greater flexibility and facilitate quicker packaging through enhanced sealing capabilities in comparison to alternative packaging materials. This demand has prompted manufacturers to develop innovative techniques for the production of BOPP films to meet the needs of diverse industries. The growing demand for BOPP films in the Indian food packaging sector is expected to enhance the market's growth in the coming years.
- BOPP films are characterized by their superior moisture barrier capabilities, while the metalized version enhances oxygen barrier performance. These attributes are vital in food packaging, as they contribute to prolonging the shelf life of products and minimizing food waste. In addition to their barrier characteristics, BOPP films ensure reliable seal integrity due to their narrow gauge spread. Their excellent heat seal strength, wide sealing window, lower seal initiation temperature, and favorable machinability further augment their effectiveness in the food packaging sector, safeguarding food quality.
- A significant factor contributing to the increased utilization of BOPP films is their comparatively low carbon footprint in relation to other plastic films. Due to their lower melting point, BOPP films necessitate less energy for conversion processes. Additionally, as

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a member of the broader polyolefin chemical family, BOPP films can be effectively laminated with polyethylene films and are generally well-received in recycling streams. In numerous applications, the demand for BOPP films has been positively influenced by the sustainability movement, often at the expense of alternative polymers.

- BOPP films are utilized in the packaging of pharmaceuticals, including blister packs, medication strips, and labels. These films provide excellent clarity, tamper-evident features, and chemical resistance, rendering them ideal for safeguarding and maintaining the integrity of pharmaceutical products. As reported by Tata Elxsi, pharmaceutical and healthcare firms in India are increasingly participating in the creation of drug delivery systems and surgical tools from the early design stages. This engagement has fostered technological progress in the pharmaceutical packaging industry. These elements are expected to enhance market demand.

- Moreover, the COVID-19 pandemic increased the demand for flexible packaging applications nationwide. India currently has a significantly lower per capita consumption of flexible packaging for fresh and processed meat and seafood compared to countries like Japan, the United States, and Western Europe. However, the adoption of flexible packaging solutions has been on the rise due to various benefits they offer, including on-site butchering, enhanced sterilization, improved traceability and recall capabilities, and extended shelf life.

India BOPP Films Market Trends

Increased Demand for Packaged Food to Drive the Market Growth

- BOPP films are essential in the food and beverage industry for the packaging of snacks, confectionery, baked goods, frozen foods, and beverages. These films offer superior sealability, an effective barrier against aromas, and protection from moisture and oxygen, thereby maintaining the freshness and quality of the packaged items. BOPP film is versatile and can be utilized to produce various packaging formats, such as stand-up pouches, vacuum pouches, and side-gusseted bags. Such packaging solutions are instrumental in safeguarding food and beverage products from potential damage during transit and storage.

- The packaged food sector in India is undergoing a significant evolution due to changing consumer tastes and improvements in production methods. With a growing interest in unique and top-notch food choices, there is a noticeable increase in the need for products that require effective packaging solutions. Consequently, the demand for food packaging is escalating in India, encompassing quantity and quality standards that will drive the expansion of the market studied.

- As reported by Invest India, the food processing sector in India ranks among the largest globally, with projections indicating that its output will attain USD 535 billion during the fiscal year 2025-2026. Notably, the Indian food and beverage packaging industry is anticipated to experience an annual growth rate exceeding 14%, potentially reaching USD 86 billion by 2029. The growing urban population underscores the urgency of addressing this challenge, emphasizing the necessity for effective food packaging solutions that facilitate the transportation, storage, and consumption of food products. This substantial growth is expected to enhance the packaging sector within the region's food industry, consequently increasing the demand for BOPP films.

- Moreover, the increasing investments in the region's food processing units are also expected to act as one of the significant drivers of the market's growth. As per IBEF, the food processing sector in India is projected to grow to USD 1,274 billion by 2027 from USD 866 billion in 2022, driven by evolving lifestyles and dietary preferences resulting from increased disposable income and urbanization. The Ministry of Food Processing Industries (MoFPI) has introduced initiatives such as Pradhan Mantri Kisan SAMPADA Yojana (PMKSY) and PM Formalisation of Micro food processing Enterprises (PMFME) to support the establishment of food processing businesses. These factors are also anticipated to enhance market opportunities for BOPP film providers.

- The food processing industry has witnessed significant advancements and investments recently, which are projected to enhance the market's opportunities in the upcoming years. As an illustration, the Ministry of Food Processing Industries received a total budget of INR 3,290 crore (USD 396 million) in the Interim Budget 2024-2025, marking a rise of approximately 13% compared to the revised estimates for the fiscal year 2024. These notable developments are anticipated to drive the demand for BOPP films in the region's food packaging sector.

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- Nevertheless, the increasing investments by the companies to drive the region's food packaging industry are also expected to drive the market's growth further. ProPak India 2024 is set to highlight emerging opportunities in food packaging driven by investments in the food processing industry. Scheduled for September 2024, the event will focus on the latest trends in food packaging in India. A special area known as the 'sustainability square' will showcase the commitment to tackling the urgent demand for sustainable packaging solutions. These notable advancements in the region are expected to propel growth in the food packaging sector.

Flexible Packaging to Grow Significantly

- BOPP films are distinguished by their moisture resistance and function as an effective barrier against oxygen, which is essential for flexible packaging solutions. Their role in prolonging shelf life is significant, as they contribute to a reduction in food waste. Furthermore, BOPP films provide reliable seal integrity with a narrow gauge spread, surpassing mere barrier functions. The increasing demand for flexible packaging within the food and beverage sector, along with the rising use of stand-up pouches, are key market drivers anticipated to enhance the prospects for BOPP films in the flexible packaging industry.
- The expanding retail sector in India is anticipated to boost the demand for flexible packaging within the region. Recognized as one of the fastest-growing retail markets globally, the Indian retail industry is evolving not only in major metropolitan areas but also in tier-1 and tier-2 cities. Furthermore, the increasing e-commerce sales across various sectors, particularly in the food industry, are expected to create significant market opportunities for BOPP films in the flexible packaging domain.
- India is poised for substantial growth in the e-commerce industry, driven by the increasing number of internet users and favorable market conditions. The market value of the e-commerce sector in India is forecasted to reach USD 123 billion by 2024, with expectations to hit USD 300 billion by 2030. The digitization of the economy and the availability of affordable internet services are among the key factors propelling the growth of digital sales in India. This trend is creating a demand for flexible packaging solutions that can accommodate personalized products, thereby contributing to market growth.
- BOPP film is widely utilized in the healthcare and pharmaceutical sectors for packaging medical products and devices. Its robustness, longevity, and see-through nature make it an ideal choice for creating various types of medical packaging, such as bags, pouches, and blister packs. This type of packaging not only safeguards the contents from harm but also facilitates effortless identification. The flexible packaging industry is gaining prominence in the Indian pharmaceutical packaging sector, with BOPP film playing a significant role.
- As per IBEF, the Indian pharmaceutical industry caters to more than 50% of the global demand for various vaccines, 40% of generic demand in the United States, and 25% of all medicine in the United Kingdom. IBEF reports that the Indian government allocated 2.6% of the country's GDP toward healthcare in the fiscal year 2023, with expectations for this figure to decrease to 2.5% by the fiscal year 2025. The Indian pharmaceutical market is projected to reach a value of USD 130 billion by the end of 2030. These significant factors are poised to boost opportunities for flexible packaging in the region, thereby benefiting the BOPP market's growth.
- Vendors are developing fresh and creative packaging options to endure the intense competition in the market. Creative packaging encompasses stand-up pouches, which have become increasingly popular, especially in the food industry. As a result of the expanding consumer preferences and growing investments in sustainable packaging options, there will be an increase in demand for flexible packaging in the region. Furthermore, the rising consumption of packaged food and beverages may further drive the demand for flexible packaging in India, thereby enhancing market opportunities.

India BOPP Films Industry Overview

The Indian BOPP film market is fragmented, and its competitive rivalry is increasing because of the increasing presence of many players running their businesses in national and international boundaries. The market is gradually substituting materials such as

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cellophane, waxing paper, and aluminum foils with BOPP films due to their favorable properties.

- August 2023: As a trailblazer in the BOPP industry in India, Cosmo First established itself as one of the foremost manufacturers of BoPP films for flexible packaging. The company successfully transitioned from producing standard commodity films to focusing on innovative specialty films. It delivers cutting-edge niche solutions, specifically value-added BoPP films, for various applications, including packaging, lamination, industrial uses, and labeling. Its product portfolio encompasses a diverse array of BOPP films, CPP films, and BOPET films.

Additional Benefits:

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

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