

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

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Report description:

The Mexico Flexible Packaging Market size is estimated at USD 3.75 billion in 2025, and is expected to reach USD 4.67 billion by 2030, at a CAGR of 4.49% during the forecast period (2025-2030).

Key Highlights

- The need for lightweight, convenient solutions across key sectors such as food and beverages, pharmaceuticals, and e-commerce primarily drives the surge in demand for flexible packaging in Mexico. Rising incomes, urbanization, and evolving consumer preferences further fuel this demand. As more consumers seek convenience and portability, the packaging industry has responded with innovative solutions that cater to these needs.
- Over the past two decades, flexible packaging has experienced significant growth attributed to technological advancements, sustainability imperatives, and favorable economics. Consumers are increasingly valuing sustainability, leading to a shift from traditional rigid packaging to more eco-friendly, flexible alternatives. This shift is driven by sustainability concerns and the need for packages that are both consumer-friendly and offer enhanced product protection. The development of new materials and technologies has enabled manufacturers to create functional and environmentally responsible packaging.
- Moreover, the demand for on-the-go packaging solutions is rising in Mexico. Manufacturers are responding by offering a variety of sizes and shapes that are not only easy to handle but also boast innovative features, such as high-barrier films that shield against moisture, making them particularly appealing to the pharmaceutical sector. These high-barrier films ensure that products remain fresh and effective for longer periods, which is crucial for maintaining the integrity of pharmaceutical products.
- Challenges loom while the demand for flexible packaging, driven by its cost-effectiveness and versatility, is set to soar in Mexico. Environmental concerns and governmental restrictions on single-use plastics hinder the market's growth trajectory. The industry must navigate these challenges by continuing to innovate and develop sustainable packaging solutions that meet regulatory requirements and consumer expectations.

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Mexico Flexible Packaging Market Trends

Pouches are Expected to Hold Significant Share

- Pouches play a pivotal role in the food and beverages segment, finding applications in pet food, baby food, and liquid packaging (such as tea, coffee, and juices). Beyond F&B, pouches are gaining traction in e-commerce, pharmaceuticals, and cosmetics, lauded for their safety, convenience, and subsequent market growth. Their versatility makes them suitable for various products, enhancing their appeal across various industries.
- As the packaging industry pivots toward heightened recyclability, there is a notable shift from multi-material to mono-material structures. This transition aims to simplify the recycling process and reduce environmental impact. Leading the charge, companies like Amcor are rolling out innovative, sustainable packaging solutions, particularly in Latin America, aiming to boost sales and align with evolving environmental norms. Amcor's commitment to sustainability includes developing packaging that meets the highest recyclability standards without compromising performance or aesthetics.
- E-commerce entities increasingly turn to pouch packaging, recognizing its efficiency and cost-effectiveness. Pouches offer superior protection and ease of handling, which is critical in the fast-paced e-commerce environment. This trend is especially pronounced in a country witnessing a burgeoning e-commerce landscape, offering a promising avenue for market expansion. According to the International Trade Administration, the e-commerce sector's growth is expected to drive significant demand for flexible packaging solutions like pouches.
- Pouch-packaged products' durability and logistical ease are key drivers for the demand for flexible packaging. Pouches provide excellent barrier properties, ensuring product freshness and extending shelf life. Additionally, pouches are cost-effective for manufacturers and tout a lightweight nature, making them a preferred choice over traditional formats like PET packaging. In 2023, Mexico's cosmetics and personal care product exports hit approximately USD 2.7 billion, slightly increasing from 2022's USD 2.6 billion, signaling a steady sectoral growth. This rise underscores the mounting international appetite for Mexican beauty and personal care offerings. The increase in export value reflects the growing global recognition of the quality and innovation inherent in Mexican cosmetic products.

Pharmaceuticals are Expected to Witness Significant Growth

- Pharmaceuticals' growing emphasis on modern packaging has prompted brands to use characteristic flexible packaging to safeguard drugs and enhance their visual appeal and marketability. In Mexico, the aesthetic allure of flexible plastic packaging stands out as a key driver for its adoption in pharmaceutical packaging. Flexible packaging offers several advantages, including lightweight properties, ease of transportation, and the ability to conform to various shapes, which makes it highly suitable for diverse pharmaceutical products.
- Also, advancements in printing technologies are amplifying the demand for flexible packaging in Mexico's pharmaceutical sector. High-definition printing allows for detailed and vibrant graphics, including critical information such as dosage instructions, expiration dates, and safety warnings. Companies like Amcor are at the forefront, offering patented, sustainable, child-resistant packaging solutions that present an eco-friendly alternative to traditional plastic packaging. These solutions meet regulatory requirements and address consumer concerns about safety and environmental impact.
- As the International Trade Administration highlighted, Mexico boasts a robust pharmaceutical market, ranking Latin America's second-largest, trailing only behind Brazil. The country's strategic location and well-established manufacturing infrastructure make it a pivotal player in the pharmaceutical supply chain. With Mexico witnessing a rise in medical equipment production and undergoing notable demographic shifts, the demand for pharmaceutical packaging is poised for a significant upsurge. The aging

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population and increasing prevalence of chronic diseases drive the need for more sophisticated and reliable packaging solutions.

- Demand for pharmaceuticals is rising, directly translating to an increased appetite for flexible packaging solutions. In 2023, Mexico's pharmaceutical exports hit a record high of around USD 2.3 billion, a notable leap from the USD 1.85 billion recorded in 2014. This surge underscores Mexico's growing importance in the global pharmaceutical market and highlights the critical role of innovative packaging solutions in supporting this growth. The continuous evolution of packaging technologies and materials will be essential in meeting the pharmaceutical industry's future demands.

Mexico Flexible Packaging Industry Overview

The Mexican flexible packaging market is fragmented, featuring prominent players such as Amcor PLC, Constantia Flexibles, Berry Global Inc., and Transcontinental. Regional companies are implementing strategic initiatives to enhance their market share, including mergers and acquisitions, expansions, and product launches. For instance, Amcor PLC focuses on sustainable packaging solutions, while Constantia Flexibles is expanding its production capabilities to meet increasing demand. Berry Global Inc. invests in advanced manufacturing technologies, and Transcontinental diversifies its product portfolio to serve various industries.

November 2023 - PAC Worldwide, a customized and contract packaging solution provider, opened its new flexible packaging facility in San Juan Vista, Mexico. PAC Worldwide would shift its operations from its Pedro Escobedo, Mexico location into the new full-service 83,000 sq. ft plant. The multinational corporation would produce various poly products and solutions from the plant, such as Mailjacket and Polyjacket mailers, pouches, roll film, and security bags.

Additional Benefits:

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

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