

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

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Report description:

The North America Flexible Packaging Market size is estimated at USD 52.60 billion in 2025, and is expected to reach USD 63.60 billion by 2030, at a CAGR of 3.87% during the forecast period (2025-2030). In terms of shipment volume, the market is expected to grow from 10.87 million tons in 2025 to 12.89 million tons by 2030, at a CAGR of 3.48% during the forecast period (2025-2030).

Increased Demand for Convenient Packaging Drives Market Growth:

The North America Flexible Packaging Market is experiencing robust growth, driven by the increasing demand for convenient packaging solutions. This surge is largely due to evolving consumer behaviors and the rapid expansion of e-commerce. For instance, supermarket and grocery store sales in the U.S. reached USD 810.28 billion in 2022, up from USD 747.84 billion in 2021, underscoring the rising demand for packaged goods. The flexible packaging industry is responding with innovative solutions that offer portability, extended shelf life, and user-friendliness.

Key Highlights

- Popularity of stand-up pouches: Stand-up pouches are increasingly popular due to their lightweight, lower production costs, and ease of use for both manufacturers and consumers.
- High demand in frozen foods: The frozen food sector is a major driver of flexible packaging demand, requiring high-performance barrier properties to prevent freezer burn and prolong shelf life.
- E-commerce sales growth: The U.S. e-commerce sector generated USD 277.582 billion in Q2 2023, highlighting the need for effective, protective packaging for online retail products.

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Changing Demographics and Lifestyle Factors Shape Market Trends:

Demographic shifts and lifestyle changes are reshaping the flexible packaging market. Consumers today prioritize health, convenience, and sustainability, prompting new packaging innovations.

Key Highlights

- Consumer preferences: A study by the Flexible Packaging Association found that 60% of consumers are willing to pay more for packaging that offers easy storage, resealability, and extended shelf life.
- Aging population: The growing elderly demographic is driving demand for easy-to-open packaging solutions, pushing advancements in adhesives and packaging design.
- Urbanization and convenience: Rapid urbanization and fast-paced lifestyles are fueling the demand for on-the-go packaging formats, particularly portion-controlled solutions that enhance convenience.

Sustainability Initiatives Drive Innovation and Market Growth:

Sustainability has become a critical focus in the flexible packaging industry. Companies are investing in eco-friendly materials and recyclable packaging to align with consumer preferences and regulatory demands.

Key Highlights

- Circular economy initiatives: In September 2023, the Canada Plastics Pact (CPP) announced a five-year plan aimed at boosting the circular economy for flexible plastic packaging across Canada.
- New recyclable products: In August 2023, Amcor introduced its curbside-recyclable AmFiber Performance Paper packaging in North America, designed to meet repulpability standards for curbside recycling.
- Water-resistant packaging: JBM Packaging's launch of HydroBlox, a recyclable and water-resistant packaging paper, is an example of how sustainability drives product development in the industry.
- Technological Advancements and Market Expansions Fuel Growth:

The flexible packaging market is seeing increased investment in new technologies and capacity expansions, fostering innovation and growth.

Key Highlights

- Mono-material packaging development: TC Transcontinental Packaging invested USD 60 million in developing recyclable flexible plastic solutions, such as a new film line to produce biaxially oriented polyethylene (BOPE) in North America.
- Facility expansion: Accredo Packaging completed a USD 10 million expansion in Texas, adding 83,000 square feet of space to support sustainable flexible packaging production.
- Smart packaging: Technologies like RFID tags, QR codes, and sensors are increasingly being integrated into flexible packaging to enhance traceability, improve quality control, and drive consumer engagement.
- Market Consolidation and Strategic Acquisitions Shape Industry Landscape:

Mergers and acquisitions are becoming increasingly common as companies seek to expand their portfolios and market reach.

Recent acquisitions: Sonoco acquired Graphic Packaging Corporation's flexible packaging division for USD 105 million in September 2023, doubling its presence in the flexible packaging market.

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Key Highlights

- SEE's acquisition of Liquibox: In February 2023, SEE completed the USD 1.15 billion acquisition of Liquibox, accelerating the growth of its CRYOVAC brand in fluids and liquids packaging.
- Future Outlook: Innovation and Sustainability at the Forefront:

The North American flexible packaging market is on the cusp of significant changes, driven by sustainability, innovation, and evolving consumer demands.

Key Highlights

- Circular economy focus: Collaborative efforts across the value chain are increasingly geared towards establishing more sustainable approaches to flexible packaging.
- Digital printing expansion: High-quality digital printing technologies are enabling customizable, cost-effective packaging solutions, further enhancing the sector's growth.
- E-commerce impact: The continued rise of e-commerce will drive ongoing demand for protective and efficient packaging solutions.
- Tech adoption: Companies are expected to increasingly rely on data-driven decision-making, using technologies to improve traceability, reduce waste, and optimize logistics within their supply chains.

North America Flexible Packaging Market Trends

Food to Holds Major Share

The food industry dominates the North America Flexible Packaging Market, representing a 52.60% market share in 2023. This segment is expected to grow from USD 25.50 billion in 2023 to USD 31.12 billion by 2029, with a steady CAGR of 3.27%.

- Convenience and lifestyle demands: Modern, fast-paced lifestyles are boosting demand for convenient, easy-to-prepare food, driving flexible packaging needs, particularly for plastic stand-up pouches.
- Eco-friendly packaging innovations: Sustainability is shaping product development, as seen with JBM Packaging's HydroBlox, which boasts 200% greater water resistance than standard paper packaging.
- Seasonal confectionery sales: Packaging demand from the confectionery industry is influenced by major holidays like Halloween, Easter, and Valentine's Day, driving innovation in seasonal packaging designs.

Canada to Witness Major Growth

Canada is emerging as the fastest-growing region within the North America Flexible Packaging Market, with a projected CAGR of 5.27% from 2024 to 2029. The market is expected to grow from USD 6.10 billion in 2023 to USD 8.35 billion by 2029.

- Growth in paper-based packaging: Canada is seeing strong expansion in paper-based packaging products, supported by projections from the FAO that the country's paper production capacity will reach 10.62 million metric tons by 2024.
- Industry and government support: Organizations like the Forest Products Association of Canada (FPAC) are driving the adoption of flexible, recyclable packaging solutions through advocacy and support for the wood, pulp, and paper industries.

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North America Flexible Packaging Market Overview

The competitive landscape of the North American flexible packaging market is dominated by large multinational corporations and specialized firms. Amcor PLC, Berry Global Group Inc., and Sealed Air Corporation are among the leading players, leveraging their global resources and technological strengths.

Innovation as a key driver: Companies like Amcor are focusing on sustainability, launching curbside-recyclable solutions such as AmFiber Performance Paper in 2023.

Investment in capacity expansion: TC Transcontinental Packaging's USD 60 million investment in recyclable flexible packaging highlights the ongoing emphasis on innovation and sustainability.

Sustainability strategies: To remain competitive, market leaders are heavily investing in recyclable materials and technologies like digital printing, while also seeking expansion through mergers and acquisitions.

Strategies for Future Success in the Market

To stay competitive in the North America Flexible Packaging Market, companies must adopt several key strategies:

Sustainability first: Prioritizing eco-friendly materials and recyclable solutions is essential to meet both consumer demand and regulatory requirements.

Technological investments: Investing in smart packaging technologies and digital printing will help enhance production efficiency and packaging innovation.

Strategic acquisitions: Expanding market reach and product portfolios through mergers and acquisitions, as seen with Sonoco's acquisition of Graphic Packaging, will be crucial.

E-commerce readiness: Tailoring packaging solutions for the booming e-commerce market while optimizing supply chains with advanced technologies like blockchain and data analytics will be key for future success.

Additional Benefits:

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

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