SCOTTS INTERNATIONAL

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

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Report description:

The Packaging Industry In China Market size is worth USD 214.23 Billion in 2025, growing at an 5.22% CAGR and is forecast to hit USD 276.29 Billion by 2030.

Key Highlights
- Rising per capita income, evolving social dynamics, and demographic shifts significantly impact the Chinese packaging industry. These changes drive the demand for innovative packaging materials, methods, and formats. As Chinese consumers become more affluent, they seek higher-quality and more sophisticated packaging solutions. The social climate in China is shifting toward increased environmental awareness, prompting a need for sustainable packaging options.
- China's packaging industry is transforming due to significant demographic and social changes. Urbanization, an aging population, and middle-class expansion are the primary factors influencing the industry's growth. These trends are generating demand for diverse packaging solutions. The growth of urban areas has increased the need for packaged foods, stimulating the packaging industry. Urban living has also prompted innovation in convenient food packaging. The aging population requires senior-friendly designs, especially for pharmaceutical products. As the middle class expands, there is a growing demand for premium and environmentally conscious packaging. E-commerce has spurred advancements in protective and visually appealing packaging solutions.
- China's packaging industry is experiencing significant growth, primarily due to robust economic development, rapid urbanization, and improved living standards. Consumer preferences are shifting toward safer, more convenient, unique, and environmentally friendly packaging. The National Bureau of Statistics of China reports that approximately 63.9% of China's population now resides in urban areas. Over the past decades, China has steadily increased its urbanization rate, further fueling the demand for diverse packaging solutions.
- China's rapid economic growth and rising living standards lead to increased demand for packaged food. The country's urban

economic expansion has prompted migration from rural areas to cities like Shanghai and Beijing. This population shift has increased food demand, establishing China's food and beverage industry as one of the world's largest. Consequently, this trend is expected to drive the demand for packaging solutions.
- Technological advancements, sustainability concerns, and favorable economics drive significant growth in China's packaging industry. Consumer interactions with packaging are evolving rapidly. The increasing focus on sustainability is replacing traditional rigid packaging with innovative, more eco-friendly, flexible packaging solutions. The demand for user-friendly packages and enhanced product protection is expected to promote flexible packaging as a viable and cost-effective alternative. Additionally, the industry is expanding due to increasing consumer demand for packaged goods with longer shelf life. However, strict regulations in the packaging industry are constraining the industry's growth.
- Chinese companies are at the forefront of innovation in packaging materials, strongly emphasizing recyclability and sustainability. This focus is creating significant demand for innovative packaging solutions in China. These companies are developing new materials and technologies that cater to the evolving needs of consumers and businesses. Both government regulations and increasing consumer awareness about environmental issues drive the push for eco-friendly packaging. As a result, the Chinese packaging industry is experiencing a shift toward more sustainable practices, which is expected to have a lasting impact and potentially influence global packaging trends.

China Packaging Market Trends

Plastic Packaging is Expected to Hold a Significant Market Share

- Plastics are among the most widely used raw materials in packaging due to their performance, cost-effectiveness, and durability. These materials offer versatility in design, lightweight properties, and resistance to various environmental factors. Common polymers include polypropylene (PP), polyethylene (PE), polyethylene terephthalate (PET), polyvinyl chloride (PVC), and biaxially oriented polypropylene (BOPP). These polymers have specific characteristics that make them suitable for different packaging applications, such as food containers, beverage bottles, flexible packaging, and protective wraps. The choice of polymer depends on factors like the product being packaged, shelf life requirements, and environmental considerations.
- Plastic packaging, which ranges from airtight wraps to durable bottles and containers, is widely used in China's food and beverage industry. Plastics have spurred innovations in packaging design within the industry. For example, modified atmosphere packaging preserves food freshness by trapping a reduced-oxygen air mixture inside the plastic package. These advanced packaging techniques are crucial in maintaining product integrity while significantly extending shelf life.
- Plastic packaging must adhere to stringent regulatory requirements, especially in the food, beverage, pharmaceutical, and drug-packaging industries. For example, the Chinese government has implemented numerous laws and regulations to safeguard foods and drinks from potential adverse effects of packaging materials. Packaging companies must comply with these laws and certification policies, which can increase operational challenges.
- In response to environmental concerns and recycling initiatives, some companies are adapting their packaging strategies. The Coca-Cola Company, for instance, introduced 500 ml bottles made entirely from recycled plastic for its signature carbonated beverages in Hong Kong. This marked the first use of 100% recycled polyethylene terephthalate (rPET) in China for Coca-Cola Original, Coca-Cola No Sugar, and Coca-Cola Plus 500 ml bottles, demonstrating the company's efforts to reduce its environmental impact.
- China plays a significant role in global plastics production, contributing substantially to trade export revenues and creating substantial production capacities for various packaging companies. China accounts for nearly one-third of global plastics production as the world's largest plastic producer. As of May 2024, China produced approximately 6.46 million metric tons of plastic products monthly. China's share of plastic materials production steadily increased to reach 6.59 million metric tons in June 2024. Over the past few decades, China's plastic export volume has continuously grown, and the industry has transitioned from focusing on quantity to quality. The future development of this industry emphasizes technological innovation with eco-friendly

concepts, driven partly by consumer health concerns and international environmental considerations.

The Food and Beverage Industry is Expected to Hold the Largest Share

- The growing food and beverage industry is a significant factor driving the demand for packaging. As consumer preferences evolve and the global population increases, there is a greater need for diverse and innovative packaging solutions. This increases packaged goods production, ranging from ready-to-eat meals to beverages and snacks. Consequently, packaging manufacturers are developing new materials and designs to meet the specific requirements of different food and beverage products, such as extended shelf life, portion control, and convenience.
- The growth of e-commerce and food delivery services in China further increases the demand for robust and efficient packaging solutions. As more consumers turn to online shopping and food delivery platforms, businesses require packaging that can protect products during transit, maintain food quality, and withstand various handling conditions. This trend has led to innovations in packaging materials and designs, focusing on durability, sustainability, and convenience. Consequently, packaging manufacturers are developing solutions that cater to the specific needs of e-commerce and food delivery, such as tamper-evident seals, insulated containers, and eco-friendly alternatives to traditional packaging materials.
- China's packaged food retail sales reached approximately USD 284 billion in 2020; the sales are expected to record a CAGR of 5.3%, reaching USD 366.7 billion by 2025. This can be attributed to urbanization, changing consumer lifestyles, rising disposable incomes, and increased demand for convenient food options. The growth of the packaged food market will impact the packaging industry, leading to innovations in packaging technologies and materials to meet evolving consumer needs and sustainability requirements.
- Expanding supermarkets and hypermarkets in China's retail sector are driving the demand for food and beverage packaging. This significantly impacts the demand for various packaging materials in the Chinese market. Paper-based packaging, such as cardboard boxes and cartons, has increased usage due to its recyclability and versatility. Plastic packaging, including bottles, containers, and films, remains popular for its durability and cost-effectiveness. Metal packaging, especially for canned foods and beverages, remains in high demand due to its superior preservation capabilities.
- Additionally, there is a growing interest in biodegradable packaging options as environmental concerns become more prominent among Chinese consumers and regulators. The diverse range of products offered in these retail formats necessitates a wide array of packaging solutions, further stimulating the packaging industry in China. In April 2024, Freshippo, Alibaba Group's technology-driven supermarket chain, strengthened its sustainability efforts by implementing in-store fruit and vegetable packaging recycling stations.

China Packaging Industry Overview

The Chinese packaging industry is fragmented, with several global and regional players, such as Berry Global Inc., Amcor Group Gmbh, Sealed Air Corporation, and Zhejiang Xinlei Packaging Co. Ltd, vying for a larger share. This industry is characterized by low product differentiation, growing levels of product penetration, and high levels of competition. Significant investment in research and development activities and strategic mergers and acquisitions have allowed the companies to gain a strong foothold in the industry.

- June 2024: Berry Global Group Inc., a global player in sustainable packaging, introduced a customizable, rectangular Domino bottle for the beauty, home, and personal care markets. This 250 ml bottle is made with up to 100% post-consumer recycled (PCR) plastic. The Domino bottle features a 75-millimeter-wide front face and customizable side panels, allowing printing on all four sides. This design maximizes opportunities for brands to create unique packaging experiences with high-impact shelf

presence. The side panels can be further customized with distinctive, textured embossing or debossing, offering a tactile experience for consumers.
- May 2024: Amcor and AVON introduced the AmPrima Plus refill pouch for AVON's Little Black Dress shower gels in China. This initiative was aimed at reducing the cosmetics industry's carbon footprint and water consumption.

Additional Benefits:

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

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Scotts International. EU Vat number: PL 6772247784
tel. 0048 603 394 346 e-mail: support@scotts-international.com
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