

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

Market Report | 2025-04-28 | 120 pages | Mordor Intelligence

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Report description:

The Polypropylene Packaging Films Market size in terms of shipment volume is expected to grow from 12.03 million tonnes in 2025 to 14.46 million tonnes by 2030, at a CAGR of 3.74% during the forecast period (2025-2030).

Flexible plastic packaging is one of the significant growing segments of the polypropylene packaging film market. Packaging films, which combine the best qualities of plastics to give a wide range of protective characteristics while using little material, are an added value and marketability for foodstuffs and other products not related to food.

The packaging industry continually adapts to meet the changing demands of consumers. Key drivers, such as rising disposable incomes and a burgeoning middle-class population, fuel the demand for polypropylene packaging films across various sectors, including consumer goods, food and beverages, and industrial products.

Moreover, with an increasing emphasis on sustainability, traditional rigid packaging solutions are being replaced by innovative, eco-friendly, flexible plastic packaging. This shift, combined with a growing appetite for user-friendly packaging and enhanced product protection, is set to elevate the demand for polypropylene packaging films.

Polypropylene has gained traction in the flexible packaging domain, primarily due to its higher melting point than PE, making it versatile for numerous applications. Additionally, the global shift from reusable to disposable packaging is anticipated to bolster the demand for polypropylene films.

The rising demand for films that extend product shelf life is propelling the growth of the polypropylene packaging film market. Also, the easy availability of eco-friendly packaging alternatives is broadening the applications of polypropylene films, further

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fueling market expansion.

In April 2024, Amcor and Kimberly Clark teamed up to launch a new packaging for their Eco Protect diapers in Peru, featuring 30% recycled materials. This hypoallergenic diaper packaging is made from plant-based fibers and includes recycled materials, promoting sustainability. Amcor took the lead in designing and producing this innovative packaging for Kimberly Clark, underscoring the commitment to a circular economy.

However, the market grapples with significant disruptions in its supply chain and manufacturing facilities, a fallout from the pandemic. Additionally, soaring raw material costs due to the energy crisis pose a potential threat to market growth.

Polypropylene Packaging Films Market Trends

BOPP Films to Witness Major Growth

- BOPP films undergo mechanical and manual stretching through a cross-direction process. These films, featuring coextruded structures, can be transparent, opaque, or metalized. The versatility and benefits of BOPP films position them as potential replacements for metal cans and cartons in the packaging industry. BOPP films are excellent alternatives to waxed paper and aluminum foil, offering higher tensile strength, lower elongation, superior gas barriers, increased stiffness, and reduced haze.
- Driven by consumer demand for practical solutions and convenient transport, BOPP films are witnessing a surge in demand. Given the stringent requirements in food packaging, BOPP films are poised for increased demand, mainly because they help preserve food's nutritional properties until consumption.
- Commonly used in the personal and household care industry, BOPP monolayer webs and laminates wrap items like soap and toothbrushes. Beyond this, the film boasts exceptional chemical resistance, a flat surface area, and UV protection. Its recyclability and non-toxic emissions have fueled its rising popularity and demand. Moreover, it offers robust barriers against water vapor, oil, and grease.
- Due to their sealing capabilities and role as an oxygen barrier, BOPP films are increasingly favored in the pharmaceutical and cosmetic industries. This trend is underscored by North America's 29% share of the global cosmetic market in 2023.
- Notably, BOPP films present a smaller environmental footprint than other plastic films. Their low melting point translates to reduced energy consumption during transformation. BOPP films easily laminate with polyethylene and maintain wide recyclability as part of the broader polyolefin chemical group.
- Key players in the polypropylene packaging films market are ramping up BOPP film production. For example, in March 2024, Toppan announced the upcoming launch of "GL-SP", an innovative eco-friendly barrier film, in India. Developed in collaboration with India's TOPPAN Speciality Films (TSF), this product is based on biaxially oriented polypropylene (BOPP).

Asia-Pacific Holds the Largest Market Share

- Convenient access to plastic materials in Asia-Pacific significantly fuels the growth of polypropylene packaging films. The region sees a rising trend in plastic packaging usage. According to a July 2024 report by the India Brand Equity Foundation, the Ministry of Commerce and Industry highlights that Western India accounts for 47% of plastic consumption, followed by Northern India at 23% and Southern India at 21%. The key industries driving this consumption include automotive, packaging, and electronic appliances. While China stands out as a pivotal market for plastic packaging, it faces challenges from legislative bans that could hinder its growth.
- Rising demand for packaged and ready-to-eat foods, coupled with the rapid expansion of e-commerce, propels the demand for polypropylene packaging films. Industries such as food and beverages, pharmaceuticals, and personal care increasingly lean

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toward flexible packaging solutions. The appeal of polypropylene films lies in their superior barrier qualities, durability, and visual allure, making them ideal for various packaging applications.

- The burgeoning middle class and the rise of organized retailing are significant catalysts for the growth of the flexible packaging industry. The export surge, which comes with specific global packaging requirements, has further invigorated the packaging industry. Dominating the Asia-Pacific packaging landscape, plastic flexible packaging is witnessing a shift even among traditional rigid packaging users. A notable driver for the expansion of polypropylene packaging films is the consumer preference for convenient packaging and products offered in reasonable laminate quantities.
- With growing investments in the food processing industry and initiatives to minimize agricultural crop waste, the demand for packaged food and vegetables is set to rise, subsequently boosting the need for polypropylene packaging films.
- As reported by Agriculture and Agri-Food Canada, sales of packaged foods in China, including instant noodles, are projected to reach around USD 16.66 billion by 2026. The data shows a consistent upward trend in the country's processed and packaged food market. This trend is expected to continue, positively impacting the demand for polypropylene packaging films in the coming years.

Polypropylene Packaging Films Industry Overview

The polypropylene packaging films market is competitive because of the presence of many players running their businesses within national and international boundaries. The market is fragmented. The major companies in the polypropylene packaging films market, such as Jindal Poly Films Ltd, CCL Industries (Innovia Films), Cosmo Films Ltd, SRF Limited, and Plastchim-T, are focusing on developing new products and adopting agile business models to address potential disruptions and ensure sustained long-term growth. Some of the key developments in the market are:

May 2024: Plastchim-T acquired Manucor SpA, gaining significant BOPP volume and expertise in flexible packaging. This acquisition boosts the production capacity to 200,000 tons annually and strengthens Europe's transportation and delivery network.

March 2024: Inteplast Group, a plastics manufacturer, secured ISCC PLUS verification for its three BOPP film facilities located in Gray Court, South Carolina; Lolita, Texas; and Morristown, Tennessee. This certification positions Inteplast as one of the first North American BOPP film producers to achieve ISCC PLUS recognition.

Additional Benefits:

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

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