

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

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Report description:

The Sugar Packaging Market size is estimated at 198.73 million tons in 2025, and is expected to reach 238.78 million tons by 2030, at a CAGR of 3.74% during the forecast period (2025-2030).

Key Highlights

- The market is witnessing a notable shift towards flexible packaging, especially as sugar is being packaged in various formats for both bulk and retail purposes. Thanks to innovations in packaging technologies, such as active and smart packaging, flexible packaging for sugar is not only feasible but also extends its shelf life.
- With the rising demand for organic and specialty sugars, there's an increasing need for specialized packaging. This ensures the protection of these high-value products during transportation and storage. Moreover, as trade becomes more globalized, there's a pressing need for standardized packaging solutions that meet the varied requirements of different countries and regions.
- According to USDA, Australia's sugar production is set to see a modest rise, reaching 4.4 million tons for the years 2022 and 2023. In the 2022/23 cycle, sugarcane production is estimated at 33.0 million tons. This increase in output is linked to an expansion in the harvested area, which has grown by 5,000 hectares to reach 350,000 hectares.
- In a market increasingly focused on health, sugar marketing is navigating significant hurdles. While consumers might unknowingly choose products high in sugar, they consider multiple factors when purchasing unprocessed sugar. As a result, the sugar bag market is heavily investing in innovative packaging solutions to boost sugar's appeal and ensure user-friendliness.
- Paper, the go-to material for paper bags, is both affordable and easily sourced. Yet, sugar in paper bags is more prone to damage. Despite this vulnerability, paper bags enable quick and convenient transportation. Their waterproof and moisture-proof qualities stand out as significant advantages. Moreover, paper bags simplify selling, storage, and consumption. An added environmental perk of using paper for bags is its degradability, leading to a minimal ecological footprint.
- Tinted tin iron is the favored material for packaging in iron boxes. These boxes, available in shapes like cylinders, rectangles,

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ovals, and pentagons, are celebrated for their durability, secure sealing, and damage resistance. The bright appearance and vibrant colors of iron box packaging not only enhance sugar's appeal but also underscore its robustness. Beyond sugar, these iron boxes are a go-to for candy packaging, with many leading packaging, gift, and candy producers leveraging them to signify product quality.

- Plastic bags reign supreme in sugar packaging, being the most commonly used option. Their moisture-proof and waterproof nature, combined with cost-effectiveness, makes them a favorite. Sugar producers often opt for these bags, available in both transparent and colored variants. Colorful wraps, especially, can elevate sugar's visual allure, a strategy embraced by both established and budding confectionery makers. Yet, a major concern looms: these plastic bags contribute to the growing issue of plastic pollution. Versatility shines through as sugar packing machines adeptly handle both plastic and paper bags, and with modern technology, they promise consistent performance.

Sugar Packaging Market Trends

Plastic Material to Hold Significant Market Share

- According to Nichrome Packaging Solutions, plastic packaging holds a significant market share due to its unparalleled functionality. Among plastic solutions, flexible plastic packaging is notable for using 70% less raw material than its rigid counterpart.
- As reported by Feedback Organization in April 2023, supermarkets dominate the UK market as primary sugar sellers. While these retailers once claimed to merely respond to consumer demand, they've since abandoned this stance. Research has consistently spotlighted the 'retailer power' of supermarkets. Acting as intermediaries, they bridge food producers and consumers. Their dominance restricts both suppliers and customers, curtailing choices in buying and selling food. This influence is evident as just five supermarkets control over 75% of the retail market share. Leveraging their 'buyer power', supermarkets dictate terms to suppliers, influencing stock selection, quality, quantity, packaging, and pricing decisions. This dynamic holds even for industry giants like Procter & Gamble, Nestle, and Unilever. With supermarkets bolstering sugar sales, they're simultaneously driving up demand for sugar packaging, especially in flexible formats like pouches and sachets. The growth of quick-service restaurants and coffee shops has further amplified the demand for sugar sachets.
- There's a growing trend of packaging sugar in flexible plastic bags, favored by sugar manufacturers for their moisture resistance, cost-effectiveness, and branding potential through color or transparency.
- Despite this, market players are gravitating towards alternatives to plastic packaging. The rising adoption of bioplastics poses a significant challenge to traditional plastic packaging in the industry. Over the forecast period, recyclable and renewable materials are poised to potentially replace plastic packaging.
- Logistex Ltd. highlights a rebound in Brazilian sugar exports via containers in 2023, after a two-year lull, influenced by the "containergeddon" movement. This increase in shipments coincided with a rise in Brazil's sugar production and a decline in seafreight rates. Additionally, challenges faced by other major global sugar producers further cemented Brazil's market leadership.
- Conversely, India faced harvest challenges and was hesitant to re-enter the sugar export market, especially with its shift towards ethanol production. This opened the door for Brazil to assert its dominance. While national producers favored bulk shipping, container shipments remained vital for exports, often involving intricate negotiations and higher value additions.
- In 2023, Brazil's containerized sugar exports reached 2.94 million tons, as noted by maritime agency Williams. This constituted 9.4% of Brazil's total exports and marked a remarkable 90.1% increase from previous years. The figure was on the verge of matching the 2017 peak of 2.98 million tons, which represented 10.7% of total shipments. Before container loading, these sugars are typically packaged in flexible bags or sacks made from woven natural materials like jute or woven plastic, frequently featuring a plastic inner lining.

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Asia-Pacific to Witness Highest Growth

- The Asia-Pacific region leads in growth, driven by notable innovations in food packaging and branding. Additionally, consumers in this region place a high value on the indulgent experience of sugar confectionery.
- Rising population, increasing income levels, evolving lifestyles, heightened media influence, and a robust economy are fueling the demand for packaging. This sector stands out as one of the most vital and rapidly expanding in the region. Notably, Care Ratings, a leading credit rating agency in India, highlights that over 49% of the country's paper production is dedicated to packaging.
- Several regulations oversee the packaging industry in the Asia-Pacific, particularly in the food and beverage sectors. Key regulations include the Prevention of Food Adulteration Act of 1956, the Plastic Waste (Management and Handling) Rules of 2011, and the Food Safety and Standards (Packaging and Labelling) Regulations of 2011.
- Anticipated regulations on paper and pulp usage in the food sector are poised to boost the market. For example, India's Food Safety and Standards Authority has rolled out new packaging regulations, aiming to bolster paper's role in food packaging. Furthermore, the BIS standard IS 4664: 1986, which allows recycled pulp in food packaging, is set to enhance paper's prominence in India's sugar packaging.
- As per the USDA Foreign Agricultural Service, India produced around 34 million metric tons of sugar in the 2023/2024 cycle. While sugar production in India has seen its ups and downs over the years, the nation proudly stands as the world's second-largest sugar producer, trailing only Brazil. In the 2023-2024 cycle, India's Cabinet Committee on Economic Affairs (CCEA) approved new norms emphasizing jute packaging. Specifically, the 2023-24 Jute Year norms mandate that jute bags must be used for 100% of food grains and 20% of sugar packaging.

Sugar Packaging Industry Overview

The study considers sugar production globally based on material type and product type. As sugar is packaged in various formats for both bulk and retail, there's been a notable shift towards flexible packaging. New technologies, like active packaging, not only facilitate this trend but also extend the shelf life of sugar. Plastic dominates the packaging market due to its unmatched functionality. Flexible plastic packaging stands out among plastic solutions, utilizing 70% less raw material than its rigid counterpart.

The sugar packaging market is moderately fragmented. Players in the market are offering extensive product customization to increase their share and augment their revenue. Some of the key players are Mondi Group, United Bags Inc, FlexPack, Klabin S.A., Berlin Packaging and more. The companies have a sustainable competitive advantage through innovations in this market, owing to the growing need.

Additional Benefits:

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

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