

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

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Report description:

The Sustainable Packaging Market size is estimated at USD 315.16 billion in 2025, and is expected to reach USD 456.04 billion by 2030, at a CAGR of 7.67% during the forecast period (2025-2030).

Key Highlights

- Sustainable packaging involves developing and utilizing packaging solutions that enhance sustainability. It relies heavily on life cycle assessments and inventories to guide decisions and minimize environmental impact.
- In recent years, consumer interest in sustainability has surged significantly. The rise of circular economics has further underscored the importance of sustainable packaging. Governments worldwide, responding to public concerns over packaging waste, particularly single-use plastics, are enacting stringent regulations to curb environmental harm and bolster waste management.
- Leading the charge, countries like France, Germany, and the United Kingdom are not only enforcing robust recycling measures within the European Union but are also adopting extended producer responsibilities (EPRs). In Asia, Thailand implemented a nationwide ban on single-use plastic bags in major stores starting January 1, 2020, with the ultimate goal of reducing plastic pollution.
- According to the Ocean Conservancy statistics, 8 million metric tons of plastic enter the oceans annually, adding to the estimated 150 million metric tons already present. This is a critical issue. To put this in perspective, it is akin to dumping a New York City garbage truck's load of plastic into the ocean every minute for a year. The survey identifies 2025 as a pivotal year for eco-friendly packaging, with over 40% of respondents planning to adopt innovative and sustainable packaging techniques. Companies are increasingly pivoting toward a circular economy, utilizing compostable materials and biodegradables and rethinking container designs to reduce waste.
- However, the use of non-recyclable, non-biodegradable plastic packaging is on the rise, exacerbating carbon emissions. In

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response, major corporations like Amazon, Google, and Tetrapak are setting ambitious targets, aiming for net-zero carbon emissions, a move expected to entail significant capital investments.

Sustainable Packaging Market Trends

The Recycled Packaging Segment to Hold Significant Share in Market

- Increasing consumer demand for sustainable products is driving the growth of recycled packaging. As environmental awareness rises, consumers are actively seeking brands that prioritize sustainability, particularly in their packaging choices. This consumer shift is compelling companies across sectors to pivot toward recycled packaging, aligning with both consumer expectations and bolstering their corporate social responsibility standings. Simultaneously, advancements in recycling technologies are streamlining the incorporation of recycled materials into packaging, enhancing cost-effectiveness for manufacturers, and further amplifying market growth.
- Global governments and regulatory bodies are pivotal in expanding the recycled packaging market. They are enacting stringent regulations and policies, with a primary focus on curbing plastic waste and promoting recycling. Notably, initiatives like the European Union's Circular Economy Action Plan and plastic waste reduction mandates in countries like the United States and Canada are nudging companies toward sustainable packaging investments. These directives not only mandate the use of recycled materials but also foster innovation in packaging design and material science, aiming to bolster recyclability and minimize environmental footprints.
- Technological strides in recycling processes are pivotal for the growth of the recycled packaging market. Innovations like chemical recycling, which breaks down plastics into their original monomers, are paving the way for high-quality recycled materials in packaging. These advancements are addressing limitations seen in traditional mechanical recycling, like material degradation and the restricted recyclability of certain plastics. With ongoing technological evolution, the quality and efficacy of recycled packaging are poised to elevate, further stoking market demand.
- Businesses are increasingly recognizing the economic merits of recycled packaging. By embracing recycled materials, companies can diminish their dependence on virgin resources, trim production costs, and buffer themselves against supply chain disruptions. Moreover, brands adopting recycled packaging not only resonate with environmentally conscious consumers but also carve out a distinct niche from their competitors, bolstering their market appeal. Consequently, both major players and smaller enterprises in the packaging realm are channeling substantial investments into recycled packaging solutions, underpinning the market's robust growth trajectory.

Asia-Pacific Expected to Register Significant Market Growth

- Chinese e-commerce giants and express delivery services are actively cutting down on packaging materials. For example, SF Express introduced recyclable packaging boxes, each capable of being recycled approximately ten times. In major cities, including first-tier and several second-tier ones, the company deployed over 100,000 of these boxes. Its primary aim is to replace traditional paper boxes and plastic bags, thereby reducing the usage of foam blocks and tape. SF Express emphasized that these efforts align with China's push for sustainable logistics growth. The company has also invested in research and development to create more durable and eco-friendly packaging solutions, ensuring that the materials used can withstand multiple cycles of use without compromising the safety and integrity of the contents.
- The rise of India's middle class, the rapid expansion of organized retail, increasing exports, and the booming e-commerce industry are all paving the way for the growth of the market studied. This growth, however, necessitates environmentally friendly packaging that ensures top-notch quality with minimal environmental repercussions. Consequently, the adoption of sustainable

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packaging practices by companies is gaining paramount importance. Companies are increasingly focusing on biodegradable materials, reducing plastic usage, and implementing innovative designs that minimize waste. Additionally, government regulations and consumer awareness are driving the shift toward greener packaging solutions, with many firms setting ambitious sustainability targets to meet these new standards.

- A recent survey by Capgemini delved into sustainability and changing consumer behavior. It revealed that 79% of consumers are altering their buying patterns, primarily driven by social responsibility, inclusivity, and environmental concerns. Notably, 53% of all consumers and a significant 57% of those aged 18 to 24 are gravitating toward lesser-known brands due to their eco-friendliness. Moreover, over half (52%) of respondents expressed an emotional connection with businesses prioritizing sustainability. The survey also highlighted that consumers are willing to pay a premium for sustainably packaged products, indicating a strong market demand for eco-friendly options. Brands that adapt to these preferences avoid losing market share to more environmentally conscious competitors.

- Key players in the region are spearheading innovations, propelling the growth of the sustainable packaging market. These innovations include the development of new materials such as plant-based plastics, advanced recycling technologies, and smart packaging solutions that enhance product shelf life while reducing environmental impact. Collaborative efforts between industry leaders, startups, and research institutions are also fostering a culture of continuous improvement and sustainability in the packaging industry.

Sustainable Packaging Industry Overview

The sustainable packaging market exhibits a high degree of fragmentation, with prominent players such as Amcor Limited, TetraPak International SA, WestRock Company, Smurfit Kappa Group PLC, and Sonoco Products Company. These companies are actively engaged in developing innovative and eco-friendly packaging solutions to meet the growing demand for sustainable practices. They invest significantly in research and development to enhance the recyclability and biodegradability of their products, striving to reduce the environmental impact of packaging materials. Additionally, these key players often collaborate with other stakeholders in the supply chain to encourage sustainability and adhere to stringent regulatory standards.

- May 2024: Amcor and AVON, a leading cosmetics company, announced the launch of the AmPrima Plus refill pouch for AVON's Little Black Dress shower gels in China. This strategic initiative aims to reduce both carbon footprint and water consumption.
- March 2024: TOPPAN, a global player in printing and packaging solutions, revolutionized sustainable packaging with the launch of GL-SP, a barrier film utilizing biaxially oriented polypropylene (BOPP) as the substrate. This new product has been added to the GL BARRIER series, renowned for its transparent vapor-deposited barrier films, which hold a leading share in the global market.

Additional Benefits:

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

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