

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

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Report description:

Beverage Packaging Market Analysis

The beverage packaging market was valued at USD 163.25 billion in 2025 and is forecast to expand at a 4.12% CAGR, reaching USD 199.81 billion by 2030. Growth is propelled by converging global regulations that standardize recycled-content thresholds, while premium ready-to-drink launches and a wave of aluminum-can capacity additions provide parallel demand engines. Packaging suppliers able to navigate recycled-material mandates, cost inflation for virgin resin, and shifting consumer preferences toward low-impact formats are capturing share. Strategic investments in closed-loop recycling, digital watermarking, and e-commerce-ready multipacks are differentiating leaders from laggards. Consolidation-exemplified by the pending Amcor-Berry Global merger-continues to reshape the competitive baseline, creating scale benefits for firms with multi-format portfolios.

Global Beverage Packaging Market Trends and Insights

Premiumisation in Ready-to-Drink Beverages

Premium RTD launches are prompting brands to upgrade from commoditized plastics to glass and sleek aluminum, enabling higher shelf price points while still meeting recycled-content requirements. In the United Kingdom, a spirits sector worth GBP 16.8 billion (USD 21.2 billion) in 2024 recorded more than 50 new distilleries during 2023, and RTD spirits are projected to expand 16.2% per year to 2030. Glass suppliers are capitalizing on premium cues, with 92% of US consumers associating glass with quality and infinite recyclability. Brand owners are pairing high-clarity containers with smart closures and QR-coded labels that

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unlock provenance data, loyalty rewards, and authenticated recycling instructions. The beverage packaging market benefits as premium SKUs carry higher packaging spend per liter, offsetting volume softness in mainstream carbonates.

Surge in Aluminium-Can Capacity Expansions

Aluminum's infinite recyclability and closed-loop recovery rates above 70% have spurred a global capacity race. Ball Corporation added a Florida line and broke ground on an Oregon plant in 2024. Novelis is building a 600,000-tonne rolling mill in Alabama under long-term supply agreements with Ardagh to accommodate forecast 4% annual can-sheet demand growth through 2031. The beverage packaging market therefore sees integrated metal suppliers gaining cost leverage and sustainability messaging advantages, pressuring plastics in beer and sparkling water.

Volatile Virgin-Resin Prices

Crude oil swings and refinery outages pushed PTA and MEG costs higher in early 2025, forcing polyester bottle-chip producers in China and Europe to idle capacity to re-balance inventories. Packaging converters on spot resin contracts saw margin compression, encouraging forward contracts or integration into mechanical recycling. The beverage packaging market therefore tilts toward suppliers holding equity stakes in recycle-ready feedstock, shielding customers from volatility.

Other drivers and restraints analyzed in the detailed report include:

PET Lightweighting and Tethered-Cap Regulations / Growth of E-commerce Multipacks / Supply Bottlenecks for Recycled PET Flakes /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Plastic retained 42% of 2024 revenue, underlining entrenched supply chains and cost advantages. Yet recycled-content directives and deposit-return expansion are challenging PET's dominance. The beverage packaging market size for plastic is projected to advance only at the overall 4.12% CAGR, tempering its share despite ongoing lightweighting and chemical-recycling projects. Paperboard's 6.65% CAGR-highest among materials-and metal's comeback via aluminum cans illustrate regulatory pull and consumer push toward renewable or infinitely recyclable substrates. Graphic Packaging International's launch of Boardio paperboard canisters and EnviroClip carriers targets carbonated soft drink multipacks once controlled by shrink-film. Integrated mills leverage domestic fiber supply and 75% recycling rates, cushioning them against virgin-resin volatility.

The beverage packaging industry is also witnessing glass repositioned as a prestige material notwithstanding higher logistics emissions. O-I Glass committed USD 150 million to modernize its Alloa, UK plant with hybrid furnaces and lightweight bottles, aiming for a 25% CO₂ cut by 2030. Aluminum enjoys a closed-loop rate above 70%, and Novelis' forthcoming mill signals confidence in long-term demand. Collectively, these shifts suggest a diversified material mix by 2030, with plastics losing points of beverage packaging market share even as absolute tonnage rises in line with population growth.

Bottles accounted for 38% of 2024 revenue thanks to versatility across carbonates, water, dairy alternates, and alcohol. The beverage packaging market size attributed to bottles is projected to grow modestly at 3.7% to 2030 amid format diversification. Tethered-cap compliance and advanced barrier coatings (e.g., plasma or silicon oxide) are unlocking incremental weight savings. However, pouches are set to capture outsized gains via a 7.23% CAGR, reflecting 60-80% lower material weight per liter and suitability for e-commerce.

Multipack wine and cocktail pouches withstand drop tests, reduce shipping costs, and utilize mono-material laminates increasingly accepted in curbside programs. Cartons continue to service aseptic dairy, juice, and now plant-based lattes, propelled by Tetra Pak's UHT filling lines with energy cuts of 25%. Cans sustain relevance through craft beer, energy drinks, and sparkling water, and their rapid chilling characteristics underpin brand loyalty. Beer kegs remain a niche at under 3% of volume, but stainless-steel re-use cycles of 25+ years align with zero-waste narratives.

The Beverage Packaging Market Report is Segmented by Material Type (Plastic, Metal, Glass, and Paperboard), Product Type (Bottles, Cans, Pouches, Cartons, and Beer Kegs), Packaging Format (Aseptic, Hot-Fill, Cold-Fill/Carbonated, Retortable, and More), Beverage Type (Carbonated Drinks, Alcoholic Beverages, Bottled Water, Milk, and More), and Geography. The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America captured 27% of 2024 revenue due to high per-capita beverage intake and premiumization headroom. Crown Holdings registered 5% North American volume growth in 2024, boosted by new Virginia and Nevada can lines. Yet state-level legislation on tethered caps and expanded-producer-responsibility fees creates compliance complexity that favors diversified multinationals. Canada's harmonized rPET targets to 2030 incent regional reclamation infrastructure, further bolstering circular-ready suppliers within the beverage packaging market. Competitive pressures arise from Asia-Pacific imports of lightweight bottles, challenging domestic converters on cost.

Asia-Pacific is forecast to post a 5.61% CAGR through 2030, underpinned by urbanization and rising disposable incomes. China recorded 2.7% output growth in beverages across the first ten months of 2023 while beer production jumped 22%. India's rPET mandate at 30% from April 2025 introduces both demand for recycled feedstock and punitive taxes for non-compliance. Multinationals with in-house recycling (e.g., Coca-Cola's PETValue facility in the Philippines) gain a foothold, whereas small converters face input scarcity. Japanese processors focus on "ready-to-eat" and healthy beverages, encouraging aseptic pouch uptake for portable nutrition.

Europe commands stringent regulatory leadership with the PPWR effective February 2025 mandating all packaging be recyclable by 2028 and 30% rPET in PET bottles by 2030. The beverage packaging market in the bloc therefore pivots toward design-for-recycling protocols such as monomaterial sleeves and water-based inks. Supply-demand imbalances in food-grade rPET keep premiums elevated, encouraging partnerships between fillers and recyclers. Glass capacity rationalization amid ESG constraints tightens supply for regional wine and premium spirits, supporting value retention. Flexible paper-based solutions gain traction as retailers commit to plastic reduction roadmaps across member states.

List of Companies Covered in this Report:

Amcor plc / Ball Corporation / Tetra Laval International SA / O-I Glass Inc. / Crown Holdings Inc. / Ardagh Group S.A. / Ardagh Metal Packaging S.A. / Verallia S.A. / Vidrala S.A. / Vetropack Holding Ltd. / Silgan Holdings Inc. / Berry Global Group Inc. / Mondi plc / Sonoco Products Company / CCL Industries Inc. / Smurfit Kappa Group plc / CANPACK S.A. / Huhtamaki Oyj / Toyo Seikan Group Holdings Ltd. / Nampak Ltd. / Krones AG / Guala Closures Group /

Additional Benefits:

 The market estimate (ME) sheet in Excel format /
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