

Flexographic Printing - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-07-01 | 110 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

Flexographic Printing Market Analysis

The flexographic printing market size stood at USD 19.80 billion in 2025 and is forecast to reach USD 26.28 billion by 2030, translating to a robust 5.83% CAGR over the period. Rising e-commerce volumes, stringent food-contact regulations, and continuous improvements in AI-enabled press automation are expected to uphold this momentum in the flexographic printing market. Equipment vendors are optimizing narrow-web and digital-hybrid presses to serve brands that juggle shorter SKU life cycles, while converters intensify water-based ink adoption to comply with global VOC thresholds. Growing demand for sustainable corrugated logistics, together with investments in rapid plate-mounting and inspection systems, keeps the flexographic printing market well placed against competing lithography and gravure methods. Asia-Pacific's manufacturing capacity, paired with government incentives for circular packaging, further cements the region's leadership role in the flexographic printing market.

Global Flexographic Printing Market Trends and Insights

Brand-owner Demand for Shorter SKU Cycles

Consumer preferences now turn over faster than ever, pushing brand managers to refresh packaging artwork frequently. Converters respond by leaning on narrow-web presses that complete plate changes in minutes, curbing downtime and material waste. Solutions such as the Onyx GO deliver active register control that lowers setup scrap by 30%. Shorter runs also let retailers

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

pilot seasonal editions without carrying surplus inventory, reducing the working-capital burden throughout the flexographic printing market. In parallel, cloud-based workflow software accelerates artwork approvals, ensuring that new designs progress from concept to shelf within weeks.

Cost-Effective Long-Run Package Printing

Where volumes exceed millions of impressions, flexography still offers the lowest unit cost. Photopolymer plates last hundreds of thousands of cycles, while energy-efficient dryers reduce operating expenses. DuPont's Orion case illustrates 30% solvent savings after migrating from gravure to flexo, along with safer shop-floor conditions. Such economics keep legacy consumer-goods lines anchored in the flexographic printing market, preserving press utilization and spare-parts sales for OEMs. Asian converters, often running three shifts, maximize these cost advantages to meet export-driven demand.

Digital Inkjet Cannibalisation in Short Runs

Advances in piezo-electric heads and aqueous dispersion inks enable variable data and near-offset image quality at competitive click rates. Pharmaceutical packagers integrate digital lines with ERP software to produce country-specific leaflets on demand, cutting inventory to zero. In response, the flexographic printing market is pivoting to hybrid presses that merge in-line inkjet stations with conventional units, preserving established finishing workflows while adding serialization capability.

Other drivers and restraints analyzed in the detailed report include:

Water-Based Ink Adoption for Food Contact Compliance / Shift Toward Sustainable Corrugated Logistics / Volatile Photopolymer Plate Prices /

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

Segment Analysis

Digital-hybrid presses lifted their share of new installations as converters sought one line that could alternate between mass-production mode and personalized batches. Although narrow-web machines secured 30.84% of revenue in 2024, the hybrid cohort is on course for 9.24% CAGR, well above the overall flexographic printing market. Typical configurations combine 10-color flexo decks for brand colors with CMYK inkjet bars placed just before the rewinder. Such set-ups reduce job changeover time to under five minutes, keeping lines profitable even when average order quantities fall below 5,000 linear m. Medium-web lines remain favored in tissue overwraps and snack wrappers, while wide-web CI flexo retains dominance in stand-up pouches. Sheet-fed presses serve folding cartons that require precise die-cutting stations downstream.

Converters equipping themselves with modular platforms can later bolt on corona treaters, chill rolls, or second inkjet bars as client mixes evolve. The SapphireLUCe exemplifies this modular path, pairing 1200 × 1200 DPI resolution with speeds of 150 mpm. Service-level agreements often bundle predictive-maintenance analytics, shrinking unplanned downtime below 2% of available hours. These feature sets sustain pricing power for OEMs, even as the broader flexographic printing market experiences competitive pressure from refurbished presses in emerging economies.

Water-based systems commanded 40.87% revenue in 2024 thanks to low odour and direct-food-contact approval in most jurisdictions. They form the baseline chemistry for corrugated boxes, folding cartons, and paper wraps. UV-curable inks, however, are projected to register 8.42% CAGR through 2030 because they support higher line speeds and excellent scratch resistance on non-porous films. Energy-curable solutions require compact LED lamps that draw 65% less power than mercury arc units, reducing plant electricity bills. Solvent variants, constrained by tightening VOC caps under the US EPA Part 59 ruling, continue to cede

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

share. Electron-beam curables remain a niche at under 2% penetration but show promise in dairy lidding and aseptic cartons.

Ink suppliers differentiate through pigment dispersion stability, rheology control, and low-migration additive packages. INX International's GelFlex EB ink removes lamination in certain snack applications, dropping gauge weight and cutting foil usage. Such innovations echo the broader sustainability narrative resonating throughout the flexographic printing market.

The Flexographic Printing Market Report is Segmented by Printing Equipment Type (Narrow Web, Medium Web, and More), Ink Type (Water-Based, Solvent-Based, and More), Substrate Type (Paper and Paperboard, Flexible Plastic Films, and More), Application (Corrugated Boxes, Folding Carton, and More), End-User Industry (Food and Beverage, and More), and Geography. The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

Asia-Pacific generated the largest revenue slice at 38.32% in 2024 and is projected to compound at 9.23% CAGR to 2030. China supplies substrates, inks, and machinery, enabling integrated cost synergies, while India posts double-digit e-commerce parcel growth that fuels domestic packaging demand. Japan and South Korea emphasize automation, pioneering press lines equipped with cobot-assisted roll changes. Government recycling targets across ASEAN incentivize water-based inks and mono-material pouch designs, broadening addressable opportunities throughout the flexographic printing market.

North America remains the technology pioneer, hosting pilot runs for AI-driven inspection cameras and cloud-connected viscosity controllers. Brand owners reward converters that demonstrate FDA-compliant low-migration workflows, sustaining high value-added print per square meter. Labor shortages persist, prompting initiatives like Ricoh's Advanced Career Education program that trains operators in press-side data analytics. Nearshoring trends reroute consumer-goods manufacturing from Asia to Mexico, spurring fresh investments in CI flexo lines within North America.

Europe maintains keen regulatory oversight, compelling swift adoption of plant-based photoinitiators and mineral-oil-free ink sets under the Zero Pollution framework. Germany anchors engineering excellence, France accelerates bio-plastic packaging, and Italy scales narrow-web competence hubs such as Bobst's 1,200 sqm Florence center. Eastern European converters leverage favorable wage structures to absorb overflow orders, reinforcing the region's diverse role in the flexographic printing market.

List of Companies Covered in this Report:

Bobst Group SA / Heidelberger Druckmaschinen AG / Mark Andy Inc. / Comexi Group / Koenig and Bauer AG / Windmoller & Holscher KG / Uteco Group / OMET SRL / Edale Ltd. / Star Flex International / InterFlex Group / Flexopack SA / Pepin Manufacturing Inc. / Wolverine Flexographic LLC / Siva Group / Gallus Ferd. Ruesch AG / Nilpeter A/S / Soma Engineering / PCMC (Barry-Wehmiller) / Tresu Group / MPS Systems B.V. /

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION
1.1 Study Assumptions and Market Definition
1.2 Scope of the Study

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET LANDSCAPE

4.1 Market Overview

4.2 Market Drivers

4.2.1 Brand - owner demand for shorter SKU cycles

4.2.2 Cost-effective long-run package printing

4.2.3 Water-based ink adoption for food contact compliance

4.2.4 Shift toward sustainable corrugated logistics

4.2.5 AI-driven press automation and waste reduction

4.2.6 E-commerce accelerates multi-wall mailers

4.3 Market Restraints

4.3.1 Digital inkjet cannibalisation in short runs

4.3.2 Volatile photopolymer plate prices

4.3.3 Solvent-based VOC regulations tightening

4.3.4 Skilled press-operator shortage

4.4 Supply-Chain Analysis

4.5 Regulatory Outlook

4.6 Technological Outlook

4.7 Porter's Five Forces Analysis

4.7.1 Bargaining Power of Suppliers

4.7.2 Bargaining Power of Buyers

4.7.3 Threat of New Entrants

4.7.4 Threat of Substitute Products

4.7.5 Intensity of Competitive Rivalry

4.8 Investment Analysis

5 MARKET SIZE AND GROWTH FORECASTS (VALUE)

5.1 By Printing Equipment Type

5.1.1 Narrow Web

5.1.2 Medium Web

5.1.3 Wide Web

5.1.4 Sheet-Fed

5.1.5 Digital-Hybrid

5.2 By Ink Type

5.2.1 Water-Based

5.2.2 Solvent-Based

5.2.3 UV-Curable

5.2.4 Electron-Beam

5.3 By Substrate Type

5.3.1 Paper and Paperboard

5.3.2 Flexible Plastic Films

5.3.3 Metallic Foil

5.3.4 Other Substrate Type

5.4 By Application

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.4.1 Corrugated Boxes
- 5.4.2 Folding Carton
- 5.4.3 Flexible Packaging
- 5.4.4 Labels
- 5.4.5 Print Media
- 5.4.6 Other Application
- 5.5 By End-user Industry
 - 5.5.1 Food and Beverage
 - 5.5.2 Healthcare and Pharmaceuticals
 - 5.5.3 Personal Care and Cosmetics
 - 5.5.4 Industrial
 - 5.5.5 Other End-user Industry
- 5.6 By Geography
 - 5.6.1 North America
 - 5.6.1.1 United States
 - 5.6.1.2 Canada
 - 5.6.1.3 Mexico
 - 5.6.2 Europe
 - 5.6.2.1 Germany
 - 5.6.2.2 United Kingdom
 - 5.6.2.3 France
 - 5.6.2.4 Italy
 - 5.6.2.5 Spain
 - 5.6.2.6 Russia
 - 5.6.2.7 Rest of Europe
 - 5.6.3 Asia-Pacific
 - 5.6.3.1 China
 - 5.6.3.2 India
 - 5.6.3.3 Japan
 - 5.6.3.4 South Korea
 - 5.6.3.5 Australia and New Zealand
 - 5.6.3.6 Rest of Asia-Pacific
 - 5.6.4 Middle East and Africa
 - 5.6.4.1 Middle East
 - 5.6.4.1.1 United Arab Emirates
 - 5.6.4.1.2 Saudi Arabia
 - 5.6.4.1.3 Turkey
 - 5.6.4.1.4 Rest of Middle East
 - 5.6.4.2 Africa
 - 5.6.4.2.1 South Africa
 - 5.6.4.2.2 Nigeria
 - 5.6.4.2.3 Egypt
 - 5.6.4.2.4 Rest of Africa
 - 5.6.5 South America
 - 5.6.5.1 Brazil
 - 5.6.5.2 Argentina
 - 5.6.5.3 Rest of South America

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

6 COMPETITIVE LANDSCAPE

6.1 Market Concentration

6.2 Strategic Moves

6.3 Market Share Analysis

6.4 Company Profiles (Includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products and Services, and Recent Developments)

6.4.1 Bobst Group SA

6.4.2 Heidelberger Druckmaschinen AG

6.4.3 Mark Andy Inc.

6.4.4 Comexi Group

6.4.5 Koenig and Bauer AG

6.4.6 Windmoller & Holscher KG

6.4.7 Uteco Group

6.4.8 OMET SRL

6.4.9 Edale Ltd.

6.4.10 Star Flex International

6.4.11 InterFlex Group

6.4.12 Flexopack SA

6.4.13 Pepin Manufacturing Inc.

6.4.14 Wolverine Flexographic LLC

6.4.15 Siva Group

6.4.16 Gallus Ferd. Ruesch AG

6.4.17 Nilpeter A/S

6.4.18 Soma Engineering

6.4.19 PCMC (Barry-Wehmiller)

6.4.20 Tresu Group

6.4.21 MPS Systems B.V.

7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

7.1 White-space and Unmet-Need Assessment

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Flexographic Printing - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-07-01 | 110 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-28"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com