SCOTTS INTERNATIONAL

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

Market Report | 2025-06-01 | 120 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:

Home Care Packaging Market Analysis

The home care packaging market reached USD 37.3 billion in 2025 and is forecast to advance to USD 47.8 billion by 2030, translating into a 5.10% CAGR. This expansion reflects steady demand for hygiene products, widening e-commerce penetration, and policy support for sustainable solutions. Momentum is reinforced by the European Union's Packaging and Packaging Waste Regulation, effective February 2025, which requires all packs to be recyclable by 2030. Material-price swings, especially in polyethylene and polypropylene, add cost volatility yet stimulate lightweighting and bio-based innovation. Asia-Pacific retains dominance thanks to urbanisation and rising disposable incomes, while the Middle East posts the quickest regional growth on the back of economic diversification. Corporate consolidation-illustrated by Amcor's USD 8.4 billion takeover of Berry Global-signals a push for scale as producers tackle raw-material inflation and looming Extended Producer Responsibility (EPR) fees.

Global Home Care Packaging Market Trends and Insights

Rising Premiumisation and Brand-Led SKU Proliferation

Demand for upscale cleaning products drives packaging innovation beyond functional containment. Brands deploy advanced barriers, smart closures, and distinctive aesthetics to justify higher price points. Tide evo fibre tiles, launched in 2024, replace plastic with a dissolvable six-layer fibre structure and target premium shoppers. Middle East beauty spending, set to hit USD 47 billion by 2027, fuels similar expectations for home-care packs. Manufacturers of dispensing and specialty closures benefit, as evidenced by Silgan's Q4 2024 sales jump to USD 639.4 million. Premiumisation simultaneously promotes smaller, design-rich formats and boosts margin resilience against resin cost swings. The trend cuts across developed and emerging markets, reshaping shelf competition within the home care packaging market.

Circular-Economy Mandates for Recyclable Mono-Material Packs

Regulators push producers toward designs that enable straightforward recycling. The EU's PPWR stipulates 100% recyclability by 2030 and 30% recycled content for single-use plastic beverage bottles, compelling shifts to mono-material structures. Unilever's paper-based detergent bottle underscores how corporate R&D aligns with looming quotas. Sixty-three countries now run formal EPR schemes, moving disposal costs from municipalities to producers and rewarding design-for-recycling approaches. Converters positioned in mono-material films gain pricing power, whereas multi-layer barrier suppliers must retool or face declining order books. Over the long term, compliance investments are expected to stabilise and support the broader home care packaging market trajectory.

Petro-chemical Resin Price Volatility

Fluctuating polyethylene and polypropylene prices compress converter margins and complicate pricing strategy. PE registered several 5 /lb hikes in 2024 - 2025 due to outages and feedstock spikes. PET saw a 1.1% jump after Tropical Storm Alberto disrupted supply. Smaller converters lack hedging tools, forcing cost-pass through or margin erosion in the home care packaging market. Volatility accelerates interest in lightweighting and alternative substrates. Converters able to shift to bio-based or recycled inputs faster can cushion against fossil-fuel price swings.

Other drivers and restraints analyzed in the detailed report include:

E-commerce Boom Accelerating Demand for Shatter-Proof Formats / Urban Asian Households Favouring Single-Dose Convenience Packs / Extended-Producer-Responsibility Fees in Europe /

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

Segment Analysis

Plastics captured 63.00% of the home care packaging market share in 2024, underlining their entrenched role in cost-effective, barrier-rich applications. The segment continues to leverage mature supply chains and versatile processing techniques. However, bioplastics, propelled by a 12.10% CAGR, increasingly command design conversations as regulators and brands prioritise renewable feedstocks.

Paper and paperboard regain relevance through high recycling rates and lower carbon footprints, yet weight and moisture sensitivity keep them from mainstream liquid detergents. Metal retains niche importance in pressurised aerosols, and glass sees marginal use due to breakage risks in e-commerce. Bioplastics' momentum spurs investment in PLA and PHA resins, with converters trialling mono-material films that still meet oxygen-barrier demands. As recycled-content mandates tighten, compatibilised blends of PCR and bio-based inputs can bolster supply stability and cost competitiveness for the home care packaging market.

Bottles and rigid containers accounted for 47.00% of the home care packaging market size in 2024, reflecting legacy production lines and consumer familiarity with traditional formats. Lightweight HDPE and PET bottles remain prevalent thanks to excellent drop-impact resistance and brand-billboard capability. Yet refill pouches and dispensing systems, expanding at a 9.90% CAGR, are redefining value propositions through material savings and circular-loop convenience. Aptar's recyclable airless bottle for dermocosmetics and B-CAP's eco dosing cap demonstrate how innovation modernises even established formats.

Pouches deliver logistics efficiencies, shaving freight weight and cubic volume, crucial for e-commerce profitability. Reusable dispensers coupled with lightweight refill sachets reduce life-cycle emissions, resonating with EPR fee structures. Meanwhile, metal cans and stick packs maintain roles in specialty cleaners requiring specific delivery modes. Across all types, converters integrate QR codes for recycling instructions, aiming to ease consumer participation in circular schemes and boost compliance metrics that underpin the future growth of the home care packaging market.

Home Care Packaging Market Report Segments the Industry Into Material (Plastic, Paper and More), Packaging Type (Bottles and Rigid Containers, Pouches and Bags and More), Product Category (Dishwashing, Insecticides and More), Form Factor(Liquids, Powders and More) and Geography. The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

Asia-Pacific dominated with 38.70% home care packaging market share in 2024, reflecting rapid urbanisation, e-commerce growth, and middle-class expansion in China, India, and Southeast Asia. China's forthcoming rules for recycled food-contact plastics will set new compliance benchmarks regionally. Japan's ageing society drives demand for easy-open packs and single-dose detergents suited to smaller households. Investment in regional packaging machinery is forecast to surpass USD 18 billion by 2024, underpinning scale-up for converters.

The Middle East is the fastest-growing territory, with a 7.80% CAGR through 2030, supported by premiumisation in Gulf Cooperation Council markets. Regional beauty and personal-care outlays-from which spillover demand for upscale home-care packs emerges-will hit USD 47 billion by 2027. Hot climates necessitate barrier enhancements and UV-stable pigments, shaping supplier specifications. Saudi Arabia's 34.6% share of GCC pharmaceutical sales highlights parallel opportunities for hygienic primary packs.

North America and Europe remain pivotal yet face tightening regulatory nets. The EU PPWR alone drives redesign budgets for global brand owners. Meanwhile, Oregon and Colorado introduce EPR schemes by July 2025, broadening producer-funded recycling models. Latin America shows emerging promise: higher raw-material costs push paper-pack prices up in 2025, signalling market maturation fastmarkets.com. Collectively, region-specific rules and consumer behaviours maintain nuanced growth paths across the home care packaging market.

List of Companies Covered in this Report:

Amcor plc / Ball Corporation / RPC Group (Berry Global) / Winpak Ltd / Aptar Group Inc. / Sonoco Products Company / Silgan Holdings / Constantia Flexibles GmbH / DS Smith plc / Can-Pack SA / ProAmpac LLC / Berry Global Group / Mondi plc / Huhtamaki Oyj / Smurfit Kappa Group / Sealed Air Corp. / WestRock Company / Albea Group / Gerresheimer AG / Tetra Pak /

Additional Benefits:

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

Table of Contents:

Scotts International. EU Vat number: PL 6772247784
tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com

5.4 By Form Factor
5.4.1 Liquids
5.4.2 Powders
5.4.3 Capsules/Tabs
5.4.4 Gels
5.4.5 Sprays/Foams
5.5 By Geography
5.5.1 North America
5.5.1.1 United States
5.5.1.2 Canada
5.5.1.3 Mexico
5.5.2 South America
5.5.2.1 Brazil
5.5.2.2 Argentina
5.5.2.3 Rest of South America
5.5.3 Europe
5.5.3.1 United Kingdom
5.5.3.2 Germany
5.5.3.3 France
5.5.3.4 Italy
5.5.3.5 Spain
5.5.3.6 Russia
5.5.3.7 Rest of Europe
5.5.4 Asia-Pacific
5.5.4.1 China
5.5.4.2 Japan
5.5.4.3 India
5.5.4.4 South Korea
5.5.4.5 Australia and New Zealand
5.5.4.6 Rest of Asia-Pacific
5.5.5 Middle East
5.5.5.1 Israel
5.5.5.2 Saudi Arabia
5.5.5.3 United Arab Emirates
5.5.5.4 Turkey
5.5.5.5 Rest of Middle East
5.5.6 Africa
5.5.6.1 South Africa
5.5.6.2 Egypt
5.5.6.3 Nigeria
5.5.6.4 Rest of Africa

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, Strategic Info, Market

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

Market Report | 2025-06-01 | 120 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*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-02-27
		Signature	