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India Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2031)

Market Report | 2025-07-01 | 363 pages | Mordor Intelligence

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Report description:

India Packaging Market Analysis

The India packaging market size is valued at USD 101.12 billion in 2025 and is forecast to reach USD 169.73 billion by 2030, advancing at a 10.73% CAGR. The India packaging market is shifting from commodity containers to technology-enabled solutions as Extended Producer Responsibility (EPR) rules demand 30% recycled content in rigid plastics by 2025 and 60% by 2029. Quick-commerce operators in tier-1 cities, rising exports of generic medicines, and consumer preference for sustainably sourced materials are expanding the India packaging market into new substrates, barrier coatings, and distribution models. Capital flows are accelerating as private equity groups finance consolidations that help converters fund automation, closed-loop recycling, and advanced analytics. Paperboard and compostable films are winning share as multinationals align procurement with global decarbonization targets, while domestic brands adapt pack formats for rural cold-chain gaps and multilingual labelling. Competition is also intensifying in bottle-to-bottle PET where joint ventures between global resin majors and local recyclers are scaling facilities close to Western and Southern manufacturing hubs.

India Packaging Market Trends and Insights

Surge in Quick-Commerce Fulfilment Demands from Tier-1 Indian Cities

Quick-commerce promises delivery in 10-30 minutes, pushing the India packaging market toward hybrid materials that cushion, insulate, and prove tamper evidence within densely packed rider bags. Corrugated mini-shippers are replacing conventional mailers to reduce scuffing across multiple hand-offs, while micro-perforated polymer windows regulate moisture for fresh produce. Temperature stability is critical for last-mile pharmacy and dairy packs; hence converters promote phase-change gel liners compatible with municipal recycling streams. UFlex noted early rural adoption of these designs, hinting that scale benefits will soon reach tier-2 cities as last-mile networks densify. Investors view the segment as a gateway to double-digit growth because high-velocity SKUs deliver repeat volumes that offset the cost of premium substrates, reinforcing the India packaging market's shift toward performance-driven value propositions.

Government EPR Mandate Accelerating Recycled-Content Adoption

The April 2025 deadline for 30% post-consumer resin in rigid plastics forces producers to redesign packs and secure food-grade rPET in a supply-constrained environment. Only five licensed Indian recyclers can supply compliant material, so beverage and dairy brands are vertically integrating or locking multi-year contracts to guarantee feedstock. Investments exceeding INR 10,000 crore since 2022 have upgraded wash lines, extruders, and de-contamination units, making recycling capacity a competitive moat rather than a statutory burden. As the target ratchets to 60% by 2029, the India packaging market anticipates accelerated mergers between resin suppliers and fillers, establishing integrated ecosystems that lower reverse logistics costs and buoy margins through extended producer credits.

Intermittent Moratoriums on Single-Use Plastics

Disparate state bans on straws, stirrers, and certain bags regulate roughly 11% of India's single-use output, leaving producers juggling dual production lines and inventory buffers. Because enforcement vacillates, small converters hesitate to finance new molds, lowering capacity utilization and inflating unit costs. Exclusions covering multi-layered food wraps and beverage bottles distort competitive parity between flexible and rigid formats, injecting uncertainty into the India packaging market's capital-planning cycles. Brands hedge by designing mono-material structures that could meet future bans yet stay price competitive, but uncertain policy cadence still compresses ROI horizons.

Other drivers and restraints analyzed in the detailed report include:

Rapid Capacity Addition in PET Bottle-to-Bottle Recycling Facilities / Ready-to-Eat Food Penetration in Rural Markets Boosting Flexible Pouches / Volatile Kraft Paper Prices on Imported Waste-Paper Disruptions /

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

Segment Analysis

Plastic retained 42.12% share of the India packaging market in 2024 thanks to unmatched versatility in food, pharma, and industrial chains. Paperboard, though smaller, expanded fastest at a 12.21% CAGR through 2030 as e-commerce, QSRs, and government procurement teams demanded visibly recyclable options. Container glass held niche strength in premium spirits and parenteral drugs, while metal cans secured longer shelf life for processed foods under rural ambient temperatures. The plastic segment's shift toward recycled content is redefining supply contracts, with UFlex recycling 6,600 t of post-consumer PET in FY 2024 as part of its backward integration plan. ITC earmarked 30-35% of its INR 20,000 crore capex to paperboards and packaging, reinforcing the trajectory toward fiber-based alternatives.

The India packaging market size for rigid plastics linked to beverages and household cleaning is projected to grow alongside recycled-content mandates that encourage stable offtake agreements for rHDPE and rPP pellets. Conversely, virgin multilayer laminates face down-trades toward paper-poly hybrid wraps that can delaminate in mainstream recycling. The India packaging industry continues to pilot enzymatic depolymerization and solvent purification to push recycled-content ceilings above 70%

without compromising food contact safety. Firms that integrate mechanical and chemical recycling at scale are expected to command a premium, shifting competitive advantage from extrusion throughput to resin reclamation proficiency.

The India Packaging Market Report is Segmented by Packaging Type (Plastic, Paper, Container Glass, Metal Cans), Packaging Format (Flexible, Rigid), End-Use Industry (Food, Beverage, Pharmaceuticals, Personal Care, Industrial, E-Commerce), and Geography (Regional Analysis). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Gerresheimer AG / AGI Glaspac / PGP Glass Private Limited / Hindusthan National Glass & Industries Ltd. / ITC Limited (Packaging Division) / JK Paper Ltd. / CANPACK INDIA PVT. LTD / Velpack Pvt. Ltd. / Smurfit WestRock / Oji India Packaging Pvt Ltd / KCL Limited / Trident Paper Box Industries / Packman Packaging Pvt. Ltd. / Hitech Corporation Limited / AptarGroup, Inc. / Manjushree Technopack Ltd. / JPFL Films Private Limited / TCPL Packaging Limited / UFlex Limited / Polyplex Corporation Ltd. / Cosmo First Limited / Hindustan Tin Works Ltd / Ball Corporation / ZENITH TINS PVT. LTD. / Kaira Can Company Ltd. / Tetra Pak International S.A. / Megaplast India Pvt Ltd / The Bag Smiths / Amcor Plc / HUHTAMAKI INDIA LTD / Sealed Air Corporation /

Additional Benefits:

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

Table of Contents:

5.1.1.1.2.3 By End-use Industry
5.1.1.1.2.3.1 Food
5.1.1.1.2.3.2 Beverage
5.1.1.1.2.3.3 Pharmaceutical
5.1.1.1.2.3.4 Cosmetics and Personal Care
5.1.1.1.2.3.5 Industrial
5.1.1.1.2.3.6 Other End-use Industry
5.1.1.2 By Product Type
5.1.1.2.1 Bottles and Jars
5.1.1.2.2 Pouches and Bags
5.1.1.2.3 Bulk-Grade Products
5.1.1.2.4 Other Product Types
5.1.1.3 By End-use Industry
5.1.1.3.1 Food
5.1.1.3.2 Beverages
5.1.1.3.3 Cosmetics and Personal Care
5.1.1.3.4 Pharamceuticals
5.1.1.3.5 Industrial
5.1.1.3.6 Other End-use Industry
5.1.2 Paper Packaging
5.1.2.1 By Product Type
5.1.2.1.1 Folding Carton
5.1.2.1.2 Corrugated Boxes
5.1.2.1.3 Liquid Paperboard
5.1.2.1.4 Other Product Type
5.1.2.2 By End-use Industry
5.1.2.2.1 Food
5.1.2.2.2 Beverages
5.1.2.2.3 E-commerce
5.1.2.2.4 Other End-use Industry
5.1.3 Container Glass
5.1.3.1 By Color
5.1.3.1.1 Green
5.1.3.1.2 Amber
5.1.3.1.3 Flint
5.1.3.1.4 Other Colors
5.1.3.2 By End-use Industry
5.1.3.2.1 Food
5.1.3.2.2 Beverage
5.1.3.2.2.1 Alcoholic
5.1.3.2.2.2 Non-Alcoholic
5.1.3.2.3 Personal Care and Cosmetics
5.1.3.2.4 Pharmaceuticals (excluding Vials and Ampoules)
5.1.3.2.5 Perfumery
5.1.4 Metal Cans and Containers
5.1.4.1 By Material Type
5.1.4.1.1 Steel

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