

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

Market Report | 2025-07-01 | 134 pages | Mordor Intelligence

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### **Report description:**

Metal Packaging Market Analysis

The metal packaging market size is valued at USD 136.22 billion in 2025 and is projected to reach USD 157.37 billion by 2030, reflecting a 2.93% CAGR over the period. Steady growth stems from circular-economy legislation, premiumisation of ready-to-drink beverages, and retailers' plastic-to-metal substitution pledges. Aluminium's superior recycling economics, combined with material-lightweighting advances and brand-owner scope-3 reduction targets, reinforce the metal packaging market as the default option for carbonated and functional beverages. Producers continue to hedge aluminium and steel price swings through long-term contracts and scrap-based supply strategies, while coating suppliers accelerate the shift to BPA-free chemistries that underpin consumer safety narratives. Competitive intensity remains moderate as the leading canmakers deepen vertical integration across coating, recycling, and digital printing capabilities to defend share in a mature yet opportunity-rich landscape.

Global Metal Packaging Market Trends and Insights

Circular-Economy Mandates Boost Can-to-Can Recycling Loops

Tighter legislation is reshaping value-chain economics by mandating minimum recycled-content thresholds that aluminium cans already exceed, giving the metal packaging market a compliance edge. The EU's PPWR requires 30% recycled material in beverage containers by 2030, yet aluminium cans average 71% recycled content. Deposit-return schemes are driving collection

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rates toward 90% by 2029, supporting predictable scrap flows and reducing virgin-metal dependency. Global producers such as Ball target 85% recycled content, reinforcing closed-loop efficiencies that temper raw-material cost risk. Australia mirrors EU rules with an 80% post-consumer threshold for food-grade cans by 2040. Sustained regulatory momentum cements aluminium's moat over PET, particularly in beverages where procurement now factors circularity scores into supplier bids.

#### Premiumization of RTD Beverages in Emerging Asia

Surging demand for premium canned drinks is accelerating the metal packaging market growth in Asia-Pacific. Japan's canned chuhai segment tripled in the United States between 2018 and 2023 as consumers seek low-calorie, low-alcohol options. Brands like Asahi's Nama Jokki can demonstrate how packaging innovations replicate on-premise experiences in at-home settings. Rising disposable incomes in China and India push premium RTD coffee, kombucha, and functional meal-replacement beverages into mainstream retail, all of which rely on cans for flavor protection and thermal performance. The premiumisation wave enables manufacturers to pass higher material costs through to consumers, sustaining margins despite aluminium volatility.

#### Price Volatility of LME Aluminium and Steel

Energy-driven price swings strain margins because the metal packaging market still relies on contracts with pass-through clauses that lag spot fluctuations. North American tariffs add complexity, forcing producers to blend hedging tools with regional sourcing to protect competitiveness. European smelters face persistent energy-cost pressure, contributing to global price turbulence. While large players offset volatility through scrap-based feedstocks and multi-year agreements, smaller converters remain exposed, which can slow capital investment cycles.

Other drivers and restraints analyzed in the detailed report include:

Retailers' Plastic-to-Metal Substitution Pledges / High Scrap Recovery Rates Lower True Cost vs. PET / Brand-Owner Push-Back on Scope-3 CO<sub>2</sub> Footprint /

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

#### Segment Analysis

Aluminium generated 42.46% of the metal packaging market share in 2024 and is projected to grow at a 3.68% CAGR through 2030, benefiting from closed-loop recycling systems that meet PPWR mandates. Steel maintains relevance in large-format food and industrial drums but grows more slowly due to weight and energy considerations. Novelis's USD 90 million UK expansion to double can-recycling capacity underscores the material's strategic importance. Aluminium's light weight reduces logistics emissions, aligning with ESG scorecards and deepening customer loyalty among beverage brands. Market participants continue to invest in remelt technology, enabling the metal packaging market size associated with secondary aluminium to expand steadily.

Secondary aluminium pricing advantages help brands manage raw-material costs relative to virgin metal, mitigating procurement risk. Hindalco's USD 10 billion capacity plan illustrates how integrated smelting and recycling hubs shorten supply chains and support aggressive recycled-content targets. Steel's magnetic recoverability remains a plus in mixed-waste streams, yet higher container weight raises transport costs as carbon taxes spread. Altogether, aluminium's cost, circularity, and weight advantages cement its leadership position, even as steel serves resilient niches that prioritize mechanical strength and puncture resistance.

Cans represented 41.67% of the metal packaging market in 2024 and are set to grow at a 6.34% CAGR, propelled by the premiumisation of RTD coffee, hard seltzer, and functional beverages across global convenience channels. Ball's Dynamark Advanced Pro variable-graphics system personalizes cans at scale, allowing marketers to boost engagement and shelf appeal.

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Food cans hold a stable base, supplying high-barrier protection that underwrites global trade in tomato paste, soups, and pet food. Aerosol cans tap personal-care growth as pent-up post-pandemic demand lifts hair styling, deodorant, and household-cleaning categories in emerging markets.

Light-weighting initiatives reduce aluminium per unit without compromising integrity, helping contain costs and shrink scope-3 footprints. Caps, closures, and lug lids maintain niche relevance by providing tamper evidence and convenience. Bulk drums and intermediate steel containers retain popularity for agrochemicals and edible oils, where reusability and UN transport certifications are critical. Collectively, these dynamics guarantee that cans remain the metal packaging market's flagship product while ancillary segments evolve through material science and design innovation.

The Metal Packaging Market Report is Segmented by Material Type (Aluminum, Steel), Product Type (Bulk Containers, Shipping Barrels and Drums, Caps and Closures, and More), End-User Industry (Beverage, Food, and More), Coating/Lining Type (BPA-Based Epoxy, BPA-NI Epoxy and More), Container Capacity (less Than 250 MI, 251-500, and More), Geography (North America, and More). The Market Forecasts are Provided in Terms of Value (USD).

### Geography Analysis

Asia-Pacific held 38.56% of the metal packaging market in 2024 and is tracking a 6.12% CAGR through 2030, anchored by China's burgeoning RTD sector and India's rising middle class. Localised can-sheet supply, combined with Hindalco's multi-billion-dollar smelter-plus-recycling build-out, underpins cost leadership and circular credentials that appeal to global brand owners. Japan contributes design leadership, exporting high-quality chuhai formats that influence regional adoption patterns, while Southeast Asian nations leverage tourism-driven beverage demand and emerging deposit-return pilots.

North America represents a mature arena where domestic can lines run near full utilisation, cushioned by long-term supply contracts with major beer and soft-drink fillers. Tariff regimes compel canmakers to source metal domestically, spurring investment in scrap-based billet facilities and warehouse automation to drive down per-unit costs. Widespread state-level bottle bills keep aluminium recovery rates above 60%, bolstering feedstock security for secondary production.

Europe combines rigorous PPWR requirements with sophisticated recycling networks, making it a crucible for coating innovations and digital watermark pilots. Crown's scalable plants in Spain and Italy recently added high-speed lines to serve craft-beer exporters, evidencing sustained opportunity even within a saturated market. South America, spearheaded by Brazil, exhibits strong volume growth as beer brand owners convert to cans for premium positioning and logistics efficiency. The Middle East and Africa trail on infrastructure, yet population expansion and rising incomes provide greenfield prospects for aerosol deodorant and canned-food penetration, ensuring region-wide growth contributions to the global metal packaging market.

### List of Companies Covered in this Report:

Ardagh Metal Packaging S.A. / Ball Corporation / Crown Holdings Inc. / CANPACK S.A. / Silgan Holdings Inc. / Greif Inc. / TUBEX Packaging GmbH / Mauser Packaging Solutions / Nampak Limited / Colep Packaging / CPMC Holdings Ltd. / Toyo Seikan Group Holdings / Amcor plc (Metal division) / AptarGroup Inc. / Alcoa Corporation / Sherwin-Williams (Can Coatings) / Novelis Inc. / Hindalco Industries Ltd. / RPC Group plc / BWAY Corporation / Berlin Packaging /

### Additional Benefits:

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

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#### 6.4.8 Mauser Packaging Solutions

#### 6.4.9 Nampak Limited

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