

Pet Food Packaging - 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:

Pet Food Packaging Market Analysis

The pet food packaging market size reached USD 11.67 billion in 2025 and is projected to expand to USD 16.8 billion by 2030, advancing at a 6.2% CAGR. Growing regulatory pressure in Europe and the United States, rapid premiumization of wet formats, and disruptive material science innovations together create a steady demand pipeline for solutions that balance barrier protection with recyclability. North America remains the largest consuming region, supported by strong e-commerce penetration and early adoption of mono-material flexibles, while Asia-Pacific records the fastest regional growth as urban pet ownership rises in China. Brand owners' 2025 sustainability pledges, rising raw-material volatility, and the FDA's phase-out of 35 PFAS food-contact approvals reinforce the need for converters to shift away from conventional multi-layer plastics toward recyclable paper, mono-PE, and bio-composite alternatives. Competitive intensity stays moderate as large integrated players capitalize on scale, but nimble specialists gain share by offering PFAS-free barriers, smart-packaging features, and design-for-recycling services that major brand owners increasingly require.

Global Pet Food Packaging Market Trends and Insights

Surge in demand for recyclable mono-material pouches post-SUP Directive

European Single-Use Plastics rules compel brand owners to abandon complex laminates, prompting converters to commercialize mono-PE structures that equal traditional barrier performance yet meet recyclability targets. Siegwerk's CIRKIT coatings now

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

enable grease, oil, and oxygen protection inside mono-PE, while Longdapac's 100% recyclable high-barrier pouches for North American brands confirm regulatory ripple effects beyond Europe.

Premiumization of wet dog food driving retort pouch adoption

North American consumers pay 30-50% premiums for chef-style wet formats, spurring investments in Amcor's AmLite HeatFlex recycle-ready pouches that preserve nutrients during thermal sterilization. Inline seal-inspection systems such as Special Dog Company's 100% coverage model safeguard quality, and NaturPak Pet's 50 million-carton annual capacity illustrates scalability requirements for premium growth.

Volatile PET and aluminum prices squeezing converter margins

Anti-dumping measures and logistics disruptions pushed European PET above EUR 1,130 t in early 2025, while global aluminum demand for cans topped USD 59 billion, compressing converter profits and hastening interest in recycled content or alternative substrates.

Other drivers and restraints analyzed in the detailed report include:

Urban pet ownership boom in China fueling small formats / E-commerce growth for specialty diets accelerating flexibles / U.S. PFAS bans triggering costly reformulations /

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

Segment Analysis

Plastics supplied 67% of 2024 revenues, making the material segment the economic backbone of the pet food packaging market. Yet brand commitments and EU rules spur a 10.6% CAGR for bio-based and composite formats. Polyethylene thrives in mono-material designs, whereas PET's volatility drives interest in chemically recycled and rPET blends. Paperboard progresses as Packaging-and-Waste Regulation deadlines approach, while lignin-bionanocomposites showcase antioxidant capabilities for future high-barrier adoption. The pet food packaging market size attached to paper and board is projected to expand at a mid-teens pace through 2030, supported by Billerud's plan to supply 300 kilotons of cartonboard annually.

Second-generation bio-composites use agricultural waste streams to cut carbon intensity without compromising machinability, offering converters a hedge against fossil feedstock risk. Amcor's Indiana recycled-PE agreement with NOVA Chemicals underpins a North American circular platform, ensuring resin availability for mono-PE pouches. Meanwhile, aluminum's high recycling rate cushions cost headwinds, keeping cans relevant for retort wet food even as converters investigate PFAS-free epoxy replacements.

Pouches captured 43% 2024 share owing to convenience, shelf appeal, and e-commerce compatibility. Retort variants underpin wet-food premiumization, while stand-up formats benefit from zipper-reseal trends among urban consumers. The other-product-types bucket, expanding at 9.5% CAGR, covers smart labels, portion-controlled dispensers, and paper-based cups that meld fiber strength with barrier coatings. Amcor's 80%-recyclable AmFiber Performance Paper proves the viability of paper for moisture-sensitive applications without sacrificing branding surface.

Graphics quality, handling efficiency, and pack-to-product ratios keep pouches favorable, yet retailer take-back pilots for curbside recycling remain limited. Smart-packaging prototypes embed freshness sensors and color-change inks, but mass uptake awaits cost parity. Bags still dominate large-volume dry food, though single-serve trends could gradually migrate volume into flexibles. Metal cans hold niche loyalty for heritage wet lines despite aluminum volatility, supported by robust recycling infrastructure.

The Pet Food Packaging Market Report is Segmented by Material (Plastic, Paper, Metal, Biobased Materials), Product Type (Pouches, Bags, Metal Cans, and More), Food Type (Dry Food, Wet Food, Chilled and Frozen, Treats), Pet Type (Dog Food, Cat Food, and More), and Geography (North America, Europe, Asia-Pacific, South America, Middle East and Africa). Market Forecasts in Value (USD).

Geography Analysis

North America controlled 34% of 2024 sales, reflecting established ownership rates and the region's early pivot to recycle-ready pouches. High producer-price inflation since 2021 elevates packaging optimization on cost and carbon, driving uptake of lightweight flexibles seasoned for e-commerce shocks. The FDA's PFAS phase-out accelerates paper-and-polymer barrier R&D, while California and Maine mandates create a patchwork that favors suppliers with lab-validated compliance toolkits.

Asia-Pacific is the fastest-growing region at 7.5% CAGR, led by China's USD 41.8 billion pet economy and digital-first purchasing habits. Local converters grapple with EVOH resin shortages that cap pouch capacity, prompting R&D into silicon-oxide and plasma-coated mono-PE as substitute barriers. Tier-2 cities show domestic brands advancing localized graphics and QR code traceability to court rising middle-income pet owners.

Europe's growth remains steady, anchored by robust regulation that forces recyclability and recycled-content integration. The Packaging-and-Packaging-Waste Regulation sets firm 2030 targets, spurring investment in paper-based bag lines and new grease-proof coatings. Single-Use Plastics requirements bring forward design-for-recycling guidelines that displace legacy multilayer structures in dry food. Cross-industry alliances such as Saica-Mondelez transfers know-how to pet food, widening supply of paper flexibles.

List of Companies Covered in this Report:

Amcor plc / Mondi plc / ProAmpac LLC / Sonoco Products Company / Constantia Flexibles Group GmbH / Crown Holdings Inc. / Ardag Group SA / Silgan Holdings Inc. / Coveris Holdings SA / American Packaging Corporation / Huhtamaki Oyj / Sealed Air Corporation / Printpack Inc. / AptarGroup Inc. / Smurfit Westrock plc / Goglio SpA / Glenroy Inc. / Winpak Ltd. / Tetra Pak International SA / Wipak Oy /

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

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET LANDSCAPE

- 4.1 Market Overview

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

4.2 Market Drivers

- 4.2.1 Surge in Demand for Recyclable Mono-Material Pouches Post-Europe SUP Directive
- 4.2.2 Premiumization of Wet Dog Food Driving High-Barrier Retort Pouch Adoption in North America
- 4.2.3 Urban Pet Ownership Boom in China Fueling Small-Pack Formats with Reclosable Zippers
- 4.2.4 E-commerce Growth for Specialty Diets Accelerating Lightweight Flexible Packaging in the US
- 4.2.5 Brand Owner 2025 Sustainability Pledges Catalyzing Paper-Based Bag Investments in Europe
- 4.2.6 EU Regulation 2024/354 on Mineral-Oil Migration Spurring Functional Barrier Laminates

4.3 Market Restraints

- 4.3.1 Volatile PET and Aluminum Prices Squeezing Converter Margins for Wet-Food Cans
- 4.3.2 US PFAS Bans in Food-Contact Boards Forcing Costly Reformulations
- 4.3.3 EVOH Barrier Resin Shortages Limiting Stand-Up Pouch Capacity in APAC
- 4.3.4 Limited Curb-Side Recyclability of Retort Structures Discouraging Retailers

4.4 Supply-Chain Analysis

4.5 Technological Outlook

4.6 Regulatory 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 Substitutes
- 4.7.5 Intensity of Competitive Rivalry

4.8 Investment Analysis

5 MARKET SIZE AND GROWTH FORECASTS (VALUE)

5.1 By Material

5.1.1 Plastic

- 5.1.1.1 Polyethylene (PE)
- 5.1.1.2 Polypropylene (PP)
- 5.1.1.3 Polyethylene Terephthalate (PET)
- 5.1.1.4 Other Plastics

5.1.2 Paper and Paperboard

5.1.3 Metal

5.1.4 Biobased and Compostie Materials

5.2 By Product Type

5.2.1 Pouches

5.2.2 Bags

5.2.3 Metal Cans

5.2.4 Other Product Types

5.3 By Type of Food

5.3.1 Dry Food

5.3.2 Wet Food

5.3.3 Chilled and Frozen

5.3.4 Treats and Snacks

5.4 By Pet Type

5.4.1 Dog Food

5.4.2 Cat Food

5.4.3 Other Pet Food

5.5 By Geography
5.5.2 North America
5.5.2.1 United States
5.5.2.2 Canada
5.5.2.3 Mexico
5.5.3 Europe
5.5.3.1 Germany
5.5.3.2 United Kingdom
5.5.3.3 France
5.5.3.4 Italy
5.5.3.5 Spain
5.5.3.6 Rest of Europe
5.5.4 Asia-Pacific
5.5.4.1 China
5.5.4.2 India
5.5.4.3 Japan
5.5.4.4 South Korea
5.5.4.5 ASEAN
5.5.4.6 Australia and New Zealand
5.5.4.7 Rest of Asia-Pacific
5.5.5 South America
5.5.5.1 Brazil
5.5.5.2 Argentina
5.5.5.3 Rest of South America
5.5.6 Middle East and Africa
5.5.6.1 Middle East
5.5.6.1.1 Saudi Arabia
5.5.6.1.2 United Arab Emirates
5.5.6.1.3 Rest of Middle East
5.5.6.2 Africa
5.5.6.2.1 South Africa
5.5.6.2.2 Kenya
5.5.6.2.3 Nigeria
5.5.6.2.4 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 as available, Strategic Information, Market Rank/Share for key companies, Products and Services, and Recent Developments)}
6.4.1 Amcor plc
6.4.2 Mondi plc
6.4.3 ProAmpac LLC
6.4.4 Sonoco Products Company
6.4.5 Constantia Flexibles Group GmbH
6.4.6 Crown Holdings Inc.

- 6.4.7 Ardagh Group SA
- 6.4.8 Silgan Holdings Inc.
- 6.4.9 Coveris Holdings SA
- 6.4.10 American Packaging Corporation
- 6.4.11 Huhtamaki Oyj
- 6.4.12 Sealed Air Corporation
- 6.4.13 Printpack Inc.
- 6.4.14 AptarGroup Inc.
- 6.4.15 Smurfit Westrock plc
- 6.4.16 Goglio SpA
- 6.4.17 Glenroy Inc.
- 6.4.18 Winpak Ltd.
- 6.4.19 Tetra Pak International SA
- 6.4.20 Wipak Oy

7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

7.1 White-Space and Unmet-Need Assessment

Pet Food Packaging - 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="2026-02-18"/>

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