SCOTTS INTERNATIONAL

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

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Report description:

Tube Packaging Market Analysis

The tube packaging market size stands at 26.03 billion units in 2025 and is projected to reach 33.96 billion units by 2030, advancing at a 5.47% CAGR. Regulatory mandates that require recyclability by 2030, combined with rising consumer demand for sustainable solutions, are compelling manufacturers to invest in mono-material and recycled-content formats. Paperboard and bio-based tubes record the fastest growth at 8.53% CAGR, while plastic formats retain volume leadership because of established processing infrastructure. End-use diversification into ready-to-eat foods and over-the-counter pharmaceuticals broadens revenue streams as brands prioritize convenience and precise dosing. Continued merger activity, led by Amcor's USD 8.4 billion combination with Berry Global, is reshaping competitive dynamics and accelerating innovation in barrier technologies that limit reliance on multi-layer plastics.

Global Tube Packaging Market Trends and Insights

Rising Demand in Personal Care and Cosmetics

Beauty brands continue to premiumize product lines, which favors tubes that protect sensitive formulations and allow controlled dispensing. Albea has trimmed concept-to-launch cycles while integrating recycled content, pursuing a 46% carbon-reduction target for 2030. Colgate's clear PET Elixir tube with EveryDrop coating improves product evacuation, underscoring user experience gains that strengthen brand loyalty. Visibility into material provenance and carbon footprint is also improving, supporting marketing narratives that resonate with eco-conscious shoppers.

Growing Consumer Preferences for Sustainable Packaging

Household-name oral care brands have shifted from composite laminates toward fully recyclable high-density polyethylene formats that can enter mainstream kerbside streams in the United Kingdom. Neopac became the first European tube maker to earn RecyClass EN 15343 certification, validating traceable recycled content and strengthening its competitive edge. Such milestones convert sustainability compliance into market differentiation, pushing the tube packaging market toward higher-value innovations.

Availability of Substitutes

Stand-up pouches, which combine light weight, easy opening, and reduced material use, are projected to hit USD 47 billion by 2029, drawing sauce and condiment brands away from tubes. MasterFoods' recyclable paper single-dose pack further illustrates how alternate formats can satisfy sustainability and portion-control priorities. These innovations pressure tube producers to highlight functional strengths, such as precise dosing and high oxygen barrier, to prevent volume erosion.

Other drivers and restraints analyzed in the detailed report include:

Recyclability Mandates Boosting Mono-material Tubes / Rising Demand for Convenience and Versatility / Raw Material Shortages and Fluctuating Costs /

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

Segment Analysis

Plastic formats accounted for 68.14% of tube packaging market share in 2024, supported by cost-efficient extrusion lines and universal brand familiarity. Within plastics, high-density polyethylene and polypropylene accommodate diverse viscosities, from creams to gels, ensuring cross-industry versatility. Laminates that stack polymer and aluminum layers continue to protect oral-care formulas where flavor retention is essential. Aluminum tubes, though niche, preserve volatile pharmaceutical actives and oxygen-sensitive foods, reinforcing a premium-priced foothold.

Paperboard and bio-based solutions, however, outpace the broader tube packaging market at an 8.53% CAGR as the PPWR accelerates the shift toward renewable substrates. Huhtamaki's OmniLock Ultra barrier paper delivers aluminum-like protection while remaining curbside-recyclable. Amcor's patented AmFiber Performance Paper similarly targets food and healthcare segments, proving that fiber-based structures can satisfy strict moisture limits. As adoption widens, plastic's volume lead is expected to narrow in absolute terms, even if it retains scale advantages.

Squeeze and collapsible tubes represented 65.34% of 2024 shipments and are projected to rise at a 7.43% CAGR, reflecting strong consumer affinity for one-handed dispensing. Impact-extruded aluminum versions ensure zero air ingress for dermatological creams, whereas co-extruded plastic variants lower weight and enhance graphic appeal. Laminated squeeze tubes remain the oral-care standard because of flavor-barrier proficiency.

Twist and precision-applicator designs fill specialized roles in prescription dermatology and luxury cosmetics where dosage accuracy is paramount. Innovations such as in-mold-label polypropylene tubes merge decoration and structure in a single step, improving line efficiency and recyclability. The breadth of sealing and decoration options keeps squeeze formats adaptable, cementing their lead in the tube packaging market.

The Tube Packaging Market Report is Segmented by Product Type (Plastics Tubes, Aluminum Tubes, Laminated Tubes, Paperboard/Bio-Based Tubes), Packaging Type (Squeeze and Collapsible, Twist), End-Use Industry (Cosmetics and Personal Care, Pharmaceutical, Food, Other End-Use Industry), Distribution Channel (Direct Sales, Indirect Sales), and Geography. The Market Forecasts are Provided in Terms of Volume (Units).

Geography Analysis

Asia-Pacific led the tube packaging market in 2024 with a 38.43% volume share and is expected to advance at 9.21% CAGR through 2030. Robust FMCG expansion in China and India, higher disposable income, and urban lifestyles underpin demand for travel-friendly personal care items and single-serve condiments. Vietnam's paper segment, on course for USD 3.5 billion revenue by 2026, illustrates regional momentum toward fiber-based packaging.

North America and Europe, while mature, are navigating stricter recycling targets that reshape sourcing strategies and capital allocation. The EU PPWR compels converters to retrofit lines for mono-material output, favoring integrated giants able to fund multi-year overhauls. In the United States and Canada, brand commitments to carbon reduction drive pilot programs that test high-recycled-content tubes at regional retailers.

Latin America and the Middle East are emerging opportunity zones as rising middle-class populations fuel packaged food growth. Brazil's packaged-food market could reach USD 168.6 billion by 2028, spurring demand for portion-controlled sauces and flavored pastes. Concurrently, ALPLA's facility roll-outs in Thailand, Africa, and the Gulf Cooperation Council underline the strategic importance of local supply in markets where import duties and logistics add cost layers.

List of Companies Covered in this Report:

Amcor plc / EPL Limited / Albea Group / Hoffmann Neopac AG / CCL Industries Corp. / Tubex Aluminium Tubes / Huhtamaki Oyj / Montebello Packaging / LINHARDT Group GmbH / CTLpack Group, S.L.U. / Plastube Inc. / Unette Corporation / Scandolara S.p.A. / Alltub Deutschland GmbH / TUBETTIFICIO PERFEKTUP S.r.l. / AptarGroup Inc. / Witoplast Kisielinscy Joint Stock Company / Mpack Poland Sp. z.o.o. / Viva Healthcare Packaging / Gp Plast Sp. z..o.o. / EPL Poland Sp. z.o.o. / Elpes sp. z.o. o. / ALPLA WERKE ALWIN LEHNER GMBH and CO KG /

Additional Benefits:

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

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