

Europe Cosmetic Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

Europe Cosmetic Packaging Market Analysis

The Europe cosmetic packaging market size in 2026 is estimated at USD 5.71 billion, growing from 2025 value of USD 5.56 billion with 2031 projections showing USD 6.52 billion, growing at 2.7% CAGR over 2026-2031. Moderate top-line growth masks far-reaching structural change as the EU Packaging and Packaging Waste Regulation compels a pivot to recyclable formats, pushes minimum recycled content thresholds, and accelerates the shift toward mono-material and refillable solutions. Demand patterns are also shaped by e-commerce fulfillment requirements, a younger consumer base favoring minimalist aesthetics, and the rapid integration of smart features that authenticate products and capture behavioral data. Competitive intensity increases as scale economies become critical for financing material innovation, AI-enabled design tools, and end-of-life collection infrastructure. Supply chain bottlenecks for recycled PET and the cost premium on bio-based polymers temper the outlook yet simultaneously create white-space opportunities for vertically integrated or specialty players.

Europe Cosmetic Packaging Market Trends and Insights

Surge in Refillable and Reusable Formats

Sales of refill solutions increased 62% across major European markets as brands validate luxury aesthetics and lower carbon footprints. Lumson's XTAG airless system delivers a 38% CO₂ reduction versus traditional formats while retaining a premium look and feel. Clarins introduced its first refillable jar with Albea, signaling mainstream adoption among prestige brands. Consumer

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sentiment is supportive, with 64% viewing refill products as genuinely eco-friendly rather than compromise solutions. Technical breakthroughs, such as FASTEN BV's recycled polypropylene jar cut material use by 70% through stackable inserts. The refill model also creates recurring revenue streams and strengthens brand loyalty by increasing direct interaction frequency.

Packaging and Packaging Waste Regulation (PPWR) Push

Final adoption of the Packaging and Packaging Waste Regulation in December 2024 introduces binding targets for 100% recyclable packaging and minimum post-consumer recycled content by 2030. Cosmetics Europe acknowledged opportunities in cost savings from harmonized rules, yet expressed concern about creative restrictions that could impact visual differentiation. The ban on miniature cosmetic bottles compels redesigns that reshape the on-shelf presence. Implementation costs favor larger players, driving consolidation as seen in the Quadpack-Texen merger. Harmonized Extended Producer Responsibility schemes reduce regulatory fragmentation but add complexity for global brands managing divergent non-EU rules.

High Cost Differential for Bio-Based Polymers

Prices for polylactic acid and bio-PET run 30% to 50% above fossil-based equivalents despite higher crude prices, locking out smaller brands that lack scale leverage. Europe's share of global bio-polymer output slipped from 13% to 10% as Asian capacity ramped faster. Feedstock constraints add volatility because sugar and starch crops compete with food markets. Reformulation costs also mount, as bio-based grades sometimes need barrier coatings or stabilizers, complicating recycling streams. Consequently, many converters prioritize recycled content strategies over bio-feedstocks to attain PPWR mandates at lower cost.

Other drivers and restraints analyzed in the detailed report include:

E-commerce-Led Demand for Protective Aesthetics
Smart or Connected Packaging for Provenance and Anti-counterfeit
Intra-EU rPET Supply Shortages

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

Segment Analysis

Plastic formats captured 61.78% share of the European cosmetic packaging market in 2025 on the back of versatility, clarity, and low unit cost. At the same time, biodegradable and compostable options, though small today, are set to post a 4.42% CAGR to 2031, reflecting technical advances and regulatory tailwinds anchored in the PPWR industrial compostability provision effective 2028. The segment continues to benefit from injection-stretch-blow investments that achieve thin-wall reductions without compromising impact resistance. Yet the resin mix is shifting. Mass-balance bio-PET and mechanically recycled PET are gaining shelf presence, especially among premium skin-care lines that accept moderate price premiums. Glass retains a loyal niche in fragrances and high-end serums due to perceived luxury, whereas aluminum containers win favor in solid haircare bars thanks to infinite recyclability.

Although plastics maintain a scale advantage, every major converter has announced R&D budgets focusing on material circularity. AINIA's cereal-based biotube demonstrates commercial feasibility with food-grade inputs and addresses compostability requirements. Multilayer barriers are gradually giving way to mono-material solutions such as Albea's polypropylene lipstick case. As material decision-making balances performance with end-of-life outcomes, converters that master drop-in bio-based grades or closed-loop resin certification stand to capture share.

Bottles and jars contributed 36.10% of 2025 revenue, yet flexible pouches and sachets are projected to log a 5.02% CAGR to 2031 as the channel mix tilts online. Stand-up pouches reduce weight by up to 70% versus rigid PET, trimming freight emissions and

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parcel costs. Sachet multi-packs combine portion control with space efficiency, traits attractive to digital fulfillment nodes. Tubes remain a core platform for color cosmetics and sun protection owing to precision dosing nozzles. Caps and applicators move toward single-polymer designs that aid recyclability, evidenced by Albea's Breizhstick, built entirely from polypropylene.

Flexible structures formerly limited to economy lines now feature high-definition flexo graphics and aluminum-free gas barriers suitable for prestige overnight masks. Converters push digital printing for small batch runs aligned with limited-edition influencer collaborations. Folding cartons keep a role in gifting but undergo weight reduction and removal of plastic windows. Portfolio managers weigh the trade-off between protective rigidity and last-mile shipping stress, optimizing through virtual drop tests.

The Europe Cosmetic Packaging Market Report is Segmented by Material Type (Plastic, Glass, Metal, and More), Product Type (Bottles and Jars, Tubes and Sticks, Folding Cartons, Pump, Dispenser and Droppers, and More), Cosmetic Type (Skin Care, Hair Care, Color Cosmetics, and More), Distribution Channel (Direct Sales Channel, and Indirect Sales Channel), and Geography. The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Albea SA AptarGroup Inc. Amcor Plc Silgan Holdings Inc. Gerresheimer AG Quadpack Industries, S.A. Berlin Packaging L.L.C. International Paper Company Smurfit WestRock Hcp Packaging Co., Ltd. Coverpla S.A.S Cosmopak USA LLC Huhtamaki Oyj Graham Packaging Company Mondi Group Sealed Air Corporation Rexam Plc (Ball Corporation) Raepak Ltd. Stoelzle Glass Group

Additional Benefits:

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

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