

## **Europe Rigid Plastic Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-01-16 | 173 pages | Mordor Intelligence

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### **Report description:**

Europe Rigid Plastic Packaging Market Analysis

The Europe rigid plastic packaging market is expected to grow from USD 71.04 billion in 2025 to USD 72.48 billion in 2026 and is forecast to reach USD 80.08 billion by 2031 at 2.02% CAGR over 2026-2031. Stricter collection targets, minimum recycled-content thresholds, and material taxes are reshaping design choices, procurement strategies, and capital allocation. Deposit-return schemes (DRS) underpin rising recycled PET demand, while energy-price volatility and feedstock inflation accelerate operational efficiency programs. Large converters pursue mergers to pool compliance resources, and producers that invest early in closed-loop infrastructure secure commercial advantages with beverage, food, and healthcare brand owners. Material substitution pressures from fiber-based alternatives intensify competition, yet rigid formats retain defensible positions wherever high barrier, reusability, or impact resistance requirements outweigh lightweighting incentives.

Europe Rigid Plastic Packaging Market Trends and Insights

Surging Demand for Recyclable Rigid PET Bottles in Beverages

Deposit-return schemes already deliver collection rates above 90% in Germany and inspire similar adoption across the bloc, lifting demand for food-grade rPET feedstock. Portugal's pilot proved technical viability with 1,281 packages captured per reverse-vending unit daily, and transparent blue PET accounted for most returns, underlining the power of color standardization to streamline sorting. The EU obligation for 25% recycled content in PET bottles by 2025 and 30% by 2030 creates an undersupplied

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secondary-material pool despite Europe's 3 million-tonne washing and 1.4 million-tonne pellet capacity. Brand owners therefore lock in bilateral offtake agreements, stimulating retrofits of washing lines and extrusion reactors. As a result, PET bottles remain the fastest-growing rigid format and anchor more than half of the upcoming resin recycling investments.

### Booming E-commerce Boosting Protective Rigid Formats

Online retail penetration exceeded 22% of total European goods sales in 2024, heightening the need for impact-resistant containers that survive multi-node fulfillment chains. Rigid drums, pails, and stackable tubs reduce breakage rates and warranty claims as parcels transit automated sorting hubs, and retailers accept marginal material increases when product-damage savings offset weight penalties. With packaging waste generation projected at 209 kg per capita by 2030, regulators now demand right-sizing evidence; nonetheless, protective rigid solutions often score favorably on life-cycle damage avoidance, sustaining a near-term boost for converters targeting e-commerce-ready designs.

### Single-Use Plastic Taxes and Extended Producer Responsibility Fees

Eco-modulated fees, effective from 2025, penalize rigid packs with limited recyclability, inflating compliance outlays for legacy designs. Differential levies-EUR 800/ton (USD 866/ton) on polystyrene trays in Italy versus EUR 456/ton (USD 494/ton) on mono-material PET in France, drive format migration and prompt SKU rationalization. Large converters absorb charges via scale efficiencies, but small molders risk margin erosion or exit, accelerating sector consolidation.

Other drivers and restraints analyzed in the detailed report include:

Growth of EU Deposit-Return Schemes Accelerating Collection Infrastructure  
Rapid Scale-up of European Bioplastics Capacity  
Shift Toward Paper and Flexible Substitutes for Lightweighting

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

### Segment Analysis

Bottles and jars contributed USD 30.71 billion, equal to 43.22% of Europe's rigid plastic packaging market size in 2025, and will keep expanding fastest at a 2.74% CAGR to 2031. This momentum stems from beverage-sector reliance on DRS-compatible PET formats and pharma demand for sterilizable HDPE pill containers. Tray and container demand hold steady in chilled-food distribution, yet PFAS bans compel barrier-coating innovation. Caps and closures evolve toward tethered designs, mandated on all single-use beverage packs by July 2024, spurring tooling upgrades across closure suppliers.

Intermediate bulk containers and drums carved a resilient niche in chemical logistics; however, e-commerce parcel density has yet to justify the broad replacement of flexible liners. Pallets and other rigid accessories maintain incremental growth, driven by circular pool operators that refurbish high-density polyethylene decks. The product mix thus remains weighted toward bottles, ensuring that PET and HDPE dominate resin off-take in the European rigid plastic packaging market.

The Europe Rigid Plastic Packaging Market Report is Segmented by Product Type (Bottles and Jars, Trays and Containers, Caps and Closures, Intermediate Bulk Containers, and More), Material (Polyethylene (PE), Polyethylene Terephthalate (PET), Polypropylene (PP), and More), End-User Industry (Food, Beverage, Healthcare, Cosmetics and Personal Care, and More), and Geography. The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

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Alpla Werke Alwin Lehner GmbH & Co KG Mauser Packaging Solutions Holding Company Amcor plc Greiner Packaging International GmbH Greif, Inc. PACCOR Packaging GmbH (Faerch Group) Plastipak Holdings, Inc. Schoeller Allibert Services B.V. Silgan Holdings Inc. Albea Group Coda Plastics Ltd. Frapak Packaging B.V. Schutz GmbH & Co. KGaA WERIT Kunststoffwerke W. Schneider GmbH & Co. KG ACTI PACK S.A.S. RETAL Industries Ltd. RIKUTEC Group AST Kunststoffverarbeitung GmbH Robinson plc Esterform Packaging Ltd.

Additional Benefits:

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

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