

## **Mexico Flexible Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-01-16 | 100 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:**

Mexico Flexible Packaging Market Analysis

The Mexico flexible packaging market is expected to grow from USD 3.84 billion in 2025 to USD 4.02 billion in 2026 and is forecast to reach USD 5.06 billion by 2031 at 4.69% CAGR over 2026-2031. Robust near-shoring of fast-moving consumer-goods (FMCG) lines from Asia, e-commerce parcel growth that demands impact-resistant formats, and rising disposable incomes in major cities collectively propel the Mexico flexible packaging market. Investors gain additional certainty from the United States-Mexico-Canada Agreement (USMCA), which secures duty-free access to North America's integrated supply chain and encourages capital allocation toward high-barrier co-extrusion, retort laminates, and mono-material innovations. Migration of domestic brewers toward export-oriented models also enlarges demand for oxygen- and light-barrier films that protect cerveza shipped to the United States and Europe, while premium pet-food processors push stand-up-pouch lines that deliver portion convenience and brand visibility. Growing sustainability mandates, particularly in Mexico City and other Tier-1 municipalities, accelerate investments in post-consumer resin (PCR) incorporation and recyclable paper-based structures as brand owners attempt to curb future packaging levies.

Mexico Flexible Packaging Market Trends and Insights

Rising Demand for Packaged Convenience Food

Urban lifestyles shorten meal-preparation time and boost sales of ready-to-eat noodles, sauces, and single-serve dairy, directly

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scott-international.com](mailto:support@scott-international.com)

[www.scott-international.com](http://www.scott-international.com)

lifting film-consumption volumes across the Mexico flexible packaging market. Processors specify multilayer polyethylene (PE)/ethylene-vinyl-alcohol (EVOH)/PE structures that combine moisture, oxygen, and aromatic barriers, thereby extending shelf life without cold-chain additions. Equipment suppliers report double-digit order growth for form-fill-seal lines adapted to 75-micron asymmetric laminates that withstand retort sterilization. Converter preference for solvent-free lamination reduces migration risk and accelerates line speeds, improving uptime in high-throughput snack plants. Brand owners simultaneously roll out 90-gram portion packs that meet calorie-control guidelines and support take-along convenience for commuting consumers.

#### Surge in E-commerce-Ready Primary Packaging

Rapid expansion of e-commerce fueled by omnichannel grocery adoption and food-delivery apps intensifies performance standards for flexible pouches shipped via third-party couriers. Converters integrate puncture-resistant nylon layers and reinforce gusset seals to survive conveyor sorters and urban motorcycle delivery. Optical-character-recognition-ready print surfaces enable precise package tracking, reducing lost parcels and customer complaints. Single-material polyethylene mailers with easy-open laser scoring replace mixed-material poly mailers banned in Mexico City's single-use plastics ordinance. Sustainability is addressed through PCR-containing co-extrusions that hit 30% recycled content, a threshold aligned with retailer procurement policies. As platforms refuse shipments that lack end-of-life labeling, demand swings sharply toward pouches carrying How2Recycle-equivalent marks.

#### Limited Municipal Collection of Flexible Films

Mexico's legacy waste network prioritizes rigid PET bottle capture, leaving thin-film recovery markedly under-invested. Municipal material-recovery facilities often lack optical sorters and air-classification decks capable of isolating LDPE and PP films, forcing converters to downcycle trim scrap rather than harvest PCR from curbside streams. Although SEDEMA reports that plastic recycling businesses in Mexico City almost tripled between 2022 and 2024, none process multi-layer films at commercial scale. Brands risk missing 2025 voluntary recyclability goals, prompting contingency evaluations of paper solutions for dry snacks. Absent infrastructure, state governments defer landfill-tax incentives that could underwrite closed-loop investments. Retailers respond by piloting in-store take-back bins, but volumes remain insufficient to justify dedicated wash-lines.

Other drivers and restraints analyzed in the detailed report include:

Growth of Pet-Food Premiumization Fueling Stand-Up Pouches  
Near-Shoring of FMCG Production to Mexico  
Volatile Polymer Resin Pricing Linked to USGC Feedstocks

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

#### Segment Analysis

Plastics remained dominant in 2025, when polyethylene, polypropylene, and specialized EVOH accounted for 47.10% of Mexico flexible packaging market share, primarily because multilayer structures provide unrivaled moisture and aroma barriers for snack and dairy exports. Paper substrates are posting the swiftest progress, growing at a 5.62% CAGR as retailers react to urban plastic-bag bans and as quick-service chains test grease-resistant, fluorine-free wraps. Mexico flexible packaging market size for paper-based formats is projected to rise steadily as converters install curtain-coating lines that apply water-based dispersions, allowing paper to handle frozen-food moisture without delamination. Aluminum foil remains indispensable for pharmaceutical blister overwraps and premium confectionery, but sustainability scrutiny spurs metallized-oxide PET adoption that mimics foil brightness while easing material separation at recyclers.

Heightened demand for mono-material solutions also influences resin selection, pushing converters toward high-density

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

polyethylene (HDPE) that meets retailer recyclability targets without sacrificing seal integrity. Meanwhile, biaxially-oriented polypropylene (BOPP) continues to dominate salty-snack front panels for its clarity and gloss, with specialty matte finishes gaining favor among premium tortilla chip brands. Paper's rise is aided by Mexico's mature pulp infrastructure in Veracruz and Sonora, which supplies FSC-certified kraft for carrier-bag and flour-sack applications. The Mexico flexible packaging industry simultaneously experiments with bio-based PE derived from sugarcane ethanol, yet high feedstock premiums limit immediate scale versus fossil-based polymers. Material decisions increasingly hinge on life-cycle-assessment metrics embedded in retailer scorecards, amplifying demand for third-party certified PCR content across both plastic and paper substrates.

The Mexico Flexible Packaging Market Report is Segmented by Material Type (Plastics, Paper, and Aluminum Foil), Product Type (Pouches, Bags and Sachets, Films and Wraps, Shrink Sleeves and Labels, and More), End-User Industry (Food, Beverage, Pharmaceutical and Medical, Household and Personal Care, and Industrial and Chemical). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Amcorg Flexitek de Mexico S.A. de C.V. Uflex Limited Transcontinental Inc. Constantia Flexibles Holding GmbH Printpack Holdings, Inc. Sealed Air Corporation Huhtamaki Oyj Winpak Ltd. Mondi plc Taghleef Industries Innovia Films Sonoco Products Company Coexpan S.A. PO Empaques Flexibles S.A. de C.V. ABA S.A. de C.V. Altopro S.A. de C.V. Emsur MacDonell S.A.U. Flair Flexible Packaging Corporation

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

4.2 Market Drivers

4.2.1 Rising demand for packaged convenience food

4.2.2 Surge in e-commerce ready primary packaging

4.2.3 Growth of pet-food premiumisation fueling stand-up pouches

4.2.4 Near-shoring of FMCG production to Mexico

4.2.5 Cerveza exports driving high-barrier retort laminates

4.3 Market Restraints

4.3.1 Limited municipal collection of flexible films

4.3.2 Volatile polymer resin pricing linked to USGC feedstocks

4.3.3 Circular-economy taxes proposed in Congress

4.3.4 Brand-owner shift to refill formats in cosmetics

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

- 4.4 Industry Value Chain Analysis
- 4.5 Regulatory Landscape
- 4.6 Technological 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 Competitive Rivalry

## 5 MARKET SIZE AND GROWTH FORECASTS (VALUE)

- 5.1 By Material Type
  - 5.1.1 Plastics
    - 5.1.1.1 Polyethylene (PE)
    - 5.1.1.2 Biaxially-Oriented Polypropylene (BOPP)
    - 5.1.1.3 Cast Polypropylene (CPP)
    - 5.1.1.4 Polyvinyl Chloride (PVC)
    - 5.1.1.5 Ethylene-Vinyl Alcohol (EVOH)
  - 5.1.2 Paper
  - 5.1.3 Aluminum Foil
- 5.2 By Product Type
  - 5.2.1 Pouches
  - 5.2.2 Bags and Sachets
  - 5.2.3 Films and Wraps
  - 5.2.4 Shrink Sleeves and Labels
  - 5.2.5 Other Formats
- 5.3 By End-user Industry
  - 5.3.1 Food
    - 5.3.1.1 Frozen Food
    - 5.3.1.2 Dairy Products
    - 5.3.1.3 Fruits and Vegetables
    - 5.3.1.4 Meat, Poultry and Seafood
    - 5.3.1.5 Baked Goods and Snacks
    - 5.3.1.6 Confectionery
    - 5.3.1.7 Other Food
  - 5.3.2 Beverage
  - 5.3.3 Pharmaceutical and Medical
  - 5.3.4 Household and Personal Care
  - 5.3.5 Industrial and Chemical

## 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, Products and Services, Recent Developments)
  - 6.4.1 Amcor plc

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

- 6.4.2 Flexitek de Mexico S.A. de C.V.
- 6.4.3 Uflex Limited
- 6.4.4 Transcontinental Inc.
- 6.4.5 Constantia Flexibles Holding GmbH
- 6.4.6 Printpack Holdings, Inc.
- 6.4.7 Sealed Air Corporation
- 6.4.8 Huhtamaki Oyj
- 6.4.9 Winpak Ltd.
- 6.4.10 Mondi plc
- 6.4.11 Taghleef Industries
- 6.4.12 Innovia Films
- 6.4.13 Sonoco Products Company
- 6.4.14 Coexpan S.A.
- 6.4.15 PO Empaques Flexibles S.A. de C.V.
- 6.4.16 ABA S.A. de C.V.
- 6.4.17 Altopro S.A. de C.V.
- 6.4.18 Emsur MacDonell S.A.U.
- 6.4.19 Flair Flexible Packaging Corporation

## 7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

### 7.1 White-space and Unmet-Need Assessment

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

**Mexico Flexible Packaging - Market Share Analysis, Industry Trends & Statistics,  
Growth Forecasts (2026 - 2031)**

Market Report | 2026-01-16 | 100 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="2026-02-28"/>
		Signature	

**Scotts International. EU Vat number: PL 6772247784**

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

www.scotts-international.com

