

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

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### **Report description:**

Mexico Packaging Market Analysis

The Mexico packaging market is expected to grow from USD 28.74 billion in 2025 to USD 30.26 billion in 2026 and is forecast to reach USD 39.13 billion by 2031 at 5.3% CAGR over 2026-2031. Nearshoring-led factory migration from Asia, escalating e-commerce volumes, and mandatory sustainability disclosures under NIS A-1 and NIS B-1 are the primary forces that keep the Mexico packaging market on an expansionary track. Plastics continue to command scale, yet paper and flexible substrates capture incremental share as brands recalibrate specifications to satisfy consumer and regulatory demands for recyclability. Digital printing technology, growing at 6.23% CAGR, enables converters to serve shorter production runs tied to nearshoring, while energy-price volatility and anti-dumping measures on Asian substrates introduce cost uncertainty. Consolidation exemplified by the Smurfit Kappa-WestRock merger signals intensifying competition as global majors seek a foothold in the Mexico packaging market.

Mexico Packaging Market Trends and Insights

Nearshoring-driven capacity expansions transform supply-chain architecture

Foreign direct investment into Mexico rose 30% in 2023 to USD 33 billion, almost half of which flowed to new entrants establishing lines that require packaging tailored for just-in-time cross-border shipments. Manufacturing's 17% share of GDP and 5.2% annual growth amplify consumption of corrugated cases, pallets, and export-grade labels. Interconnected production where 40% of a

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finished product's value is U.S.-origin calls for packaging engineered for mixed regulatory regimes and multi-modal transit. Industrial property demand is on an 80% up-swing, spurring build-outs of fully automated box plants and filling lines. Tax incentives under Plan Mexico permit 35%-91% accelerated depreciation on new fixed assets, lowering acquisition costs for converting machinery.

#### E-commerce fulfillment packaging surge reshapes material demand

Online retail penetration hit 15% of total sales in 2025 and is on track to reach USD 176.8 billion by 2026, accelerating the pivot from rigid corrugate to lightweight mailers and cushioning systems that reduce dimensional weight fees. Food-delivery platforms valued at USD 2.5 billion generated more than 300,000 tons of packaging waste in 2024, prompting Mexico City's enforcement of single-use plastic bans that have levied over 70,000 fines. Retailers invested USD 2.1 billion in store expansion and hired 640,000 workers in 2024, translating into higher secondary and tertiary packaging volumes. With e-commerce forecast to grow 9.8% CAGR, converters deploy digital work-flows and recycled content to balance sustainability mandates with protective performance. Circular pilots such as Vytal's returnable container network and Rappi's 20,000-ton plastic recovery illustrate early-stage demand for reusable formats.

#### Energy-price volatility pressures converter profitability

Electricity tariffs differ sharply across Mexico's industrial corridors, complicating budgeting for extrusion, blow-molding, and printing assets. The National Energy Plan earmarks USD 23.4 billion for grid upgrades and renewable capacity, yet timelines place tangible relief beyond 2026. Petroleum-based raw-materials costs add another layer of fluctuation, as PEMEX recalibrates feedstock allocations toward low-carbon pathways. Converters counter volatility with on-site solar arrays and energy-efficient electric blow-molding lines, but upfront capex remains prohibitive for small and mid-size firms.

Other drivers and restraints analyzed in the detailed report include:

Food-processing export boom drives specialized packaging requirements  
Mandatory recycled-content targets reshape procurement  
Anti-dumping measures disrupt Asian substrate supply chains

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

#### Segment Analysis

Plastics dominated the Mexico packaging market with 53.58% Mexico packaging market share in 2025, underpinned by durability and barrier properties demanded by food, pharmaceutical, and industrial clients. Yet stringent single-use bans in Mexico City, Durango, Quintana Roo, Zacatecas, and Michoacan incentivize substitution, elevating paper's 5.92% CAGR through 2031. Government procurements increasingly specify biodegradable or fiber-based solutions, prompting carton and molded-fiber capacity additions among converters.

Momentum also stems from technology gains in enzymatic and chemical recycling of PET that mitigate environmental pushback against plastics. Covestro, Braskem, and Carbios pilot depolymerization systems that promise lower energy intensity. For rigid glass and metal segments, growth remains stable but muted due to transport costs and weight. Composite and bio-based innovations like starch-lined corrugate and PLA blends inch toward commercial scale as material science advances.

Rigid containers retained 51.88% share of the Mexico packaging market size during 2025, driven by beverage bottles, thermoformed trays, and pharmaceutical vials that require structural integrity. However, flexible formats are poised for 6.1% CAGR, propelled by courier networks favoring lightweight pouches and mailers that cut freight charges. Brands appreciate the

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high product-to-package ratio and shelf-appeal graphics achievable on laminates and monomaterial films.

Consumer backlash against unrecyclable multilayer wraps pushes R&D toward mono-PE and mono-PP architectures compatible with mechanical recycling streams. COFEPRIS front-of-pack regulations under NOM-051 drive label redesigns on flexible substrates, fostering demand for variable data printing. Supply shocks from anti-dumping actions on Asian plastics accelerate investment in domestic film extrusion lines, enhancing regional self-reliance.

The Mexico Packaging Market Report is Segmented by Packaging Material (Plastics, Paper and Paperboard, Metal, Glass, and More), Packaging Type (Flexible Packaging, and Rigid Packaging), End-User Vertical (Food and Beverage, Personal Care and Cosmetics and More), Packaging Technology (Flexographic Printing, Digital Printing, Gravure Printing and More), and Geography. The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Grupo Gondi S.A. de C.V. Smurfit Kappa Mexico, S.A. de C.V. Envases Universales de Mexico, S.A. de C.V. Vitro, S.A.B. de C.V. Amcor Flexibles Mexico, S. de R.L. de C.V. Alpla Mexico, S.A. de C.V. Berry Global Mexico, S. de R.L. de C.V. Sealed Air de Mexico, S. de R.L. de C.V. Constantia Flexibles Mexico, S.A. de C.V. AptarGroup Mexico, S. de R.L. de C.V. Tetra Pak Mexico, S.A. de C.V. O-I Glass Packaging Mexico, S. de R.L. de C.V. International Paper Mexico, S. de R.L. de C.V. Sonoco de Mexico, S.A. de C.V. Printpack Packaging de Mexico, S. de R.L. de C.V. Bemis Flexibles Mexico, S. de R.L. de C.V. Ecolean AB Mexico Plastiglas de Mexico, S.A. de C.V. Cartones Ponderosa, S.A. de C.V. Aptiv Packaging Systems Mexico, S. de R.L. (formerly Phoenix Closures)

Additional Benefits:

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

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