

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

Market Report | 2026-01-16 | 120 pages | Mordor Intelligence

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### **Report description:**

Plastic Film Market Analysis

The plastic film market is expected to grow from USD 70.30 billion in 2025 to USD 72.53 billion in 2026 and is forecast to reach USD 84.67 billion by 2031 at 3.18% CAGR over 2026-2031. This performance underscores a maturing landscape where incremental value now arises from specialty, high-barrier films sold into medical, electronics, and e-commerce channels. Heightened regulatory attention to circular-economy goals is accelerating a pivot toward recyclable mono-material structures and certified compostable grades, while persistent raw-material price swings continue to test converter margins. Integrated producers with vertical control over resin and film assets are mitigating volatility and capturing premium spreads through downgauging, barrier-coating, and recycling initiatives.

Global Plastic Film Market Trends and Insights

Consumer Shift Toward Mono-Material Recyclable Film Structures

Circular-economy policies are swiftly converting legacy multilayer formats into mono-material films that meet recyclability thresholds without sacrificing performance. European regulations mandating full recyclability by 2030 have already spurred converters such as Uzel Plastik to roll out polyethylene pet-food films that eliminate tie-layer adhesives while preserving oxygen barriers. Brand owners are rewarding early adopters with multi-year supply contracts linked to sustainability metrics, yet initial capital outlays for new extrusion and adhesive systems are trimming near-term margins. Pharmaceutical players are also

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transitioning; Klockner Pentaplast introduced a mono-material blister film that meets stringent medical compliance while simplifying downstream recycling. This momentum is expected to lift mono-material share from 60% in 2024 toward two-thirds of the plastic film market by 2030.

#### Growing Adoption of Biodegradable and Compostable Films Amid Regulations

A mosaic of state and national mandates is fueling demand for certified compostable films, particularly in food service and produce packaging. Washington State's labeling and facility-certification rules set a technical benchmark that global suppliers must now match. Minnesota's legislation requiring industrial-composting compatibility is influencing private-label specifications for supermarket chains. Suppliers with robust R&D budgets, such as DNP Group, are commercializing multilayer compostable structures capable of 90-day degradation while sustaining gas-barrier properties that protect snack foods. Lack of harmonized global standards remains a hurdle, forcing converters to produce country-specific SKUs and inflating compliance costs.

#### Volatility in Polyolefin and PET Feedstock Prices

Quarterly swings of 15-20% in PET and LDPE spot prices have compressed converter spreads, particularly among non-integrated players. ChemOrbis data show PET values oscillating between USD 1,200 and USD 1,450 per ton in 2024, making long-term contracts risky for suppliers dependent on spot resin. Overcapacity in Asia's BOPET segment has driven realizations to historical lows; Firsta Group recorded instances where margins dipped below INR 15/kg, triggering temporary plant shutdowns. Inventory management is further complicated by lengthy transit times, causing small converters to absorb losses during price retracements.

Other drivers and restraints analyzed in the detailed report include:

Rising Demand for High-Barrier Films in Medical and Electronics Packaging  
Expansion of Agri-Film Usage in Vertical Farming and Greenhouse Automation  
Stringent Single-Use Plastic Bans in Emerging Economies

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

#### Segment Analysis

Polyethylene retained 39.12% of 2025 volume, underpinned by metallocene catalyst technology that slashed film gauge by up to 20% without surrendering stiffness or clarity. This dominance supplied predictable cash flows even when oil-linked feedstock costs spiked. In contrast, bioplastics, though representing a modest baseline, are set to post a 5.87% CAGR as brand owners deploy compostable packaging pilots to meet ESG targets. Rising supply of second-generation feedstock, including sugarcane bagasse and algae oils, has clipped the cost premium to conventional resins. Still, high-barrier medical and electronics uses remain out of reach for most bioplastics due to hydrolytic-stability constraints.

Converters courting the bioplastic subsector are negotiating multi-year off-take pacts with resin start-ups to hedge price-volatility risk. Regional clustering around EU and North-American compost facilities also influences plant-location decisions. Polypropylene continues expanding within retort pouch applications, benefiting from heat-resistance and grease-barrier traits, while BOPET producers seek anti-dumping shelters in markets like the United States to escape Asian oversupply. Specialty polymers such as cyclic olefin copolymers fill niche roles in medical diagnostics, emphasizing the value of performance-led differentiation within the plastic film market.

The pouch format delivered 47.95% of 2025 sales thanks to portion-control convenience and seal-integrity that reduces food waste. Automated form-fill-seal lines, common in snack and pet-food factories, favor its geometry, while digital printing allows hyper-customized graphics for short campaigns. However, wraps and overwraps are forecast to grow at 4.56% CAGR as

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omnichannel grocery and meal-kit services demand puncture-resistant films compatible with high-speed bagging robots. Cold-chain compliance amplifies the need for moisture barriers that stay ductile at sub-zero temperatures, an area where BOPP-based laminates have recently gained traction.

Converters are integrating data-matrix codes into secondary wraps to track last-mile delivery conditions, creating analytics revenue streams beyond the material sale itself. Linerless label films and shrink-bundling for multipacks remain important, though growth is slower due to maturation in carbonated-drink markets. Across applications, film formats enabling resource efficiency such as perforated produce wraps that modulate respiration align with retailer sustainability pledges and thus secure shelf space despite premium pricing.

The Plastic Film Market Report is Segmented by Resin Type (Polypropylene, Polyethylene, BOPET, Polystyrene, Bioplastics, and More), Application (Wraps and Overwraps, Bags and Linings, and More), Film Functionality (Low-Barrier Mono-Material, Medium-Barrier Metallised, and More), End-Use Industry (Food, Beverages, Healthcare and Pharmaceutical, and More), and Geography. The Market Forecasts are Provided in Terms of Value (USD).

### Geography Analysis

Asia-Pacific secured a 37.98% share of the plastic film market in 2025 by pairing scale economies with burgeoning domestic consumption. China maintains dominance in BOPET and BOPP, though capacity additions have outstripped local demand by roughly 260,000 t a year, pressing margins and catalyzing M&A among mid-tier converters. India leverages metallocene-catalyst technology to serve upgraded pouch formats and is onboarding new BOPP lines at a brisk pace. Japan's mature yet highly technical ecosystem sustains innovation in optical and battery-separator films.

North America's demand is steadier, buoyed by on-shoring trends and sustainability mandates that push recyclable PE wraps for e-commerce. Polyplex's USD 100 million PET-film expansion in Alabama illustrates the pull of regional supply chains aligned with trade-policy certainty. Converters increasingly co-locate with logistics hubs to shrink lead times, a factor critical for meal-kit and pharmaceutical shipments.

Europe continues to act as a policy bellwether; extended-producer-responsibility (EPR) fees penalize non-recyclable formats, driving R&D dollars into mono-material upgrades. Mechanical-recycling capacity additions are ramping, and venture funds are backing chemical-recycling pilots aimed at rigid-flexible feedstock mixes.

The Middle East and Africa is poised for a 7.86% CAGR through 2031 on the back of import-substitution plans and regulatory incentives. Egypt's joint venture to build a recycled-polyester fiber line worth USD 54.8 million signals rising local appetite for circular solutions. Gulf Cooperation Council members leverage hydrocarbon integration to supply competitively priced PE, spawning downstream film clusters that aim to capture regional food-security programs. Sub-Saharan Africa's demand growth is driven by population expansion and fast-moving consumer-goods uptake, though infrastructure gaps in waste management may moderate adoption of premium sustainable films.

South America delivers mid-single-digit growth as branded food and personal-care multinationals widen rural retail penetration, creating incremental packaging needs. Currency volatility and regulatory divergence between Mercosur nations complicate capacity planning, yet rising household incomes sustain baseline consumption.

### List of Companies Covered in this Report:

Amcort plc Toray Industries, Inc. Oben Holding Group S.A. Taghleef Industries LLC Jindal Poly Films Limited Cosmo First Limited Uflex Limited DuPont Teijin Films Japan Ltd. Sealed Air Corporation Mondi plc Huhtamki Oyj Polifilm GmbH CCL Industries Inc.

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Additional Benefits:

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

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