SCOTTS INTERNATIONAL

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

Market Report | 2026-02-09 | 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:

Germany Plastic Packaging Market Analysis

The Germany plastic packaging market is expected to grow from USD 25.35 billion in 2025 to USD 26.16 billion in 2026 and is forecast to reach USD 30.59 billion by 2031 at 3.18% CAGR over 2026-2031. The expansion reflects the sector's ongoing transition toward circular-economy design principles while absorbing higher energy costs and stringent regulatory demands. Food packaging remains the anchor for volume, accounting for 39.32% of 2024 revenues, yet cosmetics and personal care is the pace-setter with a 5.58% CAGR through 2030. Flexible formats consolidate their lead as e-commerce, lightweight logistics and mono-material adoption intensify. In rigid solutions, PET benefits from Germany's deposit system and high recycling rates, whereas polypropylene compounds gain traction in automotive light-weighting programs. Despite a 4.3% decline in domestic converter turnover during 2024, the Germany plastic packaging market continues to demonstrate resilience through high collection rates, rapid material innovation and deep industrial integration.

Germany Plastic Packaging Market Trends and Insights

Extended Producer Responsibility mandates driving recyclable mono-material demand

Germany's Packaging Act tightens recyclability rules, prompting brand owners to shift from complex laminates toward single-polymer structures. The Central Agency Packaging Register (ZSVR) released updated minimum standards in 2024 that attach higher compliance fees to multi-layer packs, channeling investment into mono-material polyethylene and polypropylene barrier solutions. Mondi and Fressnapf's recyclable mono-material pet-food pouch exemplifies how regulatory pressure is translating into large-scale commercial roll-outs. The approach also helps procurement teams score higher on retailer sustainability scorecards, turning compliance into a market differentiator.

E-commerce boom in Germany fueling lightweight flexible parcel mailers

Online retail keeps growing even as volumes fluctuate, pushing parcel operators to trim packing weight. DS Smith estimates 791 million plastic shipping bags were deployed in German fashion logistics during 2024 with unit demand projected to rise 42% to 2030. Flexible mailers reduce dimensional weight fees and carbon emissions, making them the default choice for apparel and small electronics. Amazon's pledge to phase out plastics in its own fulfillment operations pressures third-party sellers to follow, accelerating the shift toward mono-material recyclables.

Proposed EUR 0.80/kg German plastics tax inflating virgin resin prices

The Single-Use Plastics Fund Act that entered force in January 2025 levies EUR 0.80 on every kilogram of non-recycled plastic packaging. The Federal Environment Agency estimates annual collections near EUR 1.4 billion, a direct hit on converters working with virgin polymer streams umweltbundesamt.de. The measure sharpens the financial case for recycled content but also squeezes margins where food-grade rPET or rPP supply remains tight. Coupled with a 265% spike in industrial electricity tariffs since 2022, several mid-sized extruders have paused expansion plans.

Other drivers and restraints analyzed in the detailed report include:

Automotive & industrial lightweighting shifting from metal to rigid plasticsMehrweg PET refill quotas accelerating rPET preform and bottle usageRetailer-led fiber shift shrinking plastic shelf share

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

Segment Analysis

Polyethylene retained 44.12% share of flexible revenues in 2025, underpinned by cost efficiency, high seal integrity and mature recycling streams. The Germany plastic packaging market size for polyethylene formats stood at USD 11.26 billion in 2025 and continues to edge upward as converters roll out mono-material pouches with EVOH-free oxygen barriers. Emerging films such as recyclable polyolefin-based paper-touch laminates are expanding at 6.55% CAGR, indicating sustained R&D investment in lightweight, high-barrier structures that unlock producer responsibility fee rebates.

Other rigid resins tell a similar story. PET captured 33.05% share of rigid revenues thanks to the deposit-return system, while polypropylene outpaces other rigid substrates with a 5.49% CAGR through 2031. Polypropylene's dimensional stability and heat resistance suit it for ready-meal trays and EV battery casings, reinforcing its demand in both consumer and industrial verticals. Conversely PVC and polystyrene continue to lose traction under recycling-related policy headwinds.

Flexible solutions held 53.62% share of 2025 revenues, validating their role as the workhorse of the Germany plastic packaging market. Stand-up pouches, pre-zipped bags and form-fill-seal webs deliver material savings of up to 70% compared with rigid tubs, a decisive advantage for brand owners paying modulated eco-fees. The segment's 4.58% CAGR through 2031 eclipses rigid formats because flexible lines require lower capital and operate at faster change-over speeds, helping converters absorb fluctuating run sizes linked to e-commerce.

Rigid containers remain indispensable for carbonated beverages, cosmetics jars and pharma applications requiring dimensional stability. PET bottles achieve 93% take-back and high optical clarity, preventing contamination of food-grade rPET loops. Meanwhile, SCHOTT Pharma's cardboard-based syringe wallet demonstrates how even high-value medical devices are testing fiber-slash-plastic hybrids to align with hospital waste-segregation protocols.

The Germany Plastic Packaging Market Report is Segmented by Material Type (Rigid Plastic, Flexible Plastic), Packaging Type (Rigid: Bottles and Jars, Trays and Clamshells, Other Rigid; Flexible: Pouches, Bags and Sacks, Films and Wraps, Other Flexible), End-Use Industry (Food, Beverage, Pharmaceutical, and More), and Distribution Channels (Direct Sales, Indirect Sales). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Amcor plc Constantia Flexibles Group Alpla Werke Alwin Lehner GmbH Sudpack Verpackungen GmbH & Co. KG Gerresheimer AG Klockner Pentaplast GmbH Paccor Packaging GmbH Mondi Group (Germany) Huhtamaki Oyj (Germany) Schur Flexibles Holding GmbH Bischof + Klein SE & Co. KG Greiner Packaging GmbH Sealed Air Corporation Sonoco Products Company Coveris Holding SA Wipak Walsrode GmbH & Co. KG Tetra Laval Group Silgan Holdings Inc. Plastipak Holdings Inc.

Additional Benefits:

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

Table of Contents:

5.3.2.4 Carbonated Soft Drinks
5.3.2.5 Other Beverages
5.3.3 Pharmaceutical
5.3.4 Cosmetics and Personal Care
5.3.5 Industrial
5.3.6 Pet Food and Animal Care
5.3.7 Other End-use Industry
5.4 By Distribution Channels
5.4.1 Direct Sales Channels
5.4.2 Indirect Sales Channels

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
6.4.2 Constantia Flexibles Group
6.4.3 Alpla Werke Alwin Lehner GmbH
6.4.4 Sudpack Verpackungen GmbH & Co. KG
6.4.5 Gerresheimer AG
6.4.6 Klockner Pentaplast GmbH
6.4.7 Paccor Packaging GmbH
6.4.8 Mondi Group (Germany)
6.4.9 Huhtamaki Oyj (Germany)
6.4.10 Schur Flexibles Holding GmbH
6.4.11 Bischof + Klein SE & Co. KG
6.4.12 Greiner Packaging GmbH
6.4.13 Sealed Air Corporation
6.4.14 Sonoco Products Company
6.4.15 Coveris Holding SA
6.4.16 Wipak Walsrode GmbH & Co. KG
6.4.17 Tetra Laval Group
6.4.18 Silgan Holdings Inc.
6.4.19 Plastipak Holdings Inc.

7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK
7.1 White-Space and Unmet-Need Assessment

SCOTTS INTERNATIONAL

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

Market Report | 2026-02-09 | 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*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-02-26
		Signature	

Scotts International. EU Vat number: PL 6772247784
tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com