Flexible Packaging Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Flexible & Barrier Packaging (Packaging)
> **Source:** https://www.mordorintelligence.com/industry-reports/flexible-packaging-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 351.22 billion
Projected Forecast (2031)	USD 351.22 billion
Growth Rate (CAGR)	4.26 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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![Major players in Flexible Packaging industry](images/chart_2.png)

![Flexible Packaging Market (2025 - 2030)](images/chart_3.png)

![Flexible Packaging Industry: Market Share by Material Type, 2025](images/chart_4.png)

![Flexible Packaging Industry: Market Share by End-Use Industry, 2025](images/chart_5.png)

![Flexible Packaging Industry CAGR (%), Growth Rate by Region](images/chart_6.png)

![Flexible Packaging Market](images/chart_7.png)

![footer background image](images/chart_10.png)

![Mordor Intelligence on Facebook](images/chart_12.svg)

![Mordor Intelligence on Pinterest](images/chart_14.svg)

![Mordor Intelligence on Instagram](images/chart_15.svg)

![ESOMAR](images/chart_17.png)

![GPTW](images/chart_19.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period | 2020 - 2031 |
Market Size (2026) | USD 351.22 Billion |
Market Size (2031) | USD 432.74 Billion |
Growth Rate (2026 - 2031) | 4.26 % |
Fastest Growing Market | Middle East and Africa |
Largest Market | Asia Pacific |
Market Concentration | Low |

Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Flexible Packaging Market Analysis by Mordor IntelligenceThe Flexible Packaging market size is expected to grow from USD 336.87 billion in 2025 to USD 351.22 billion in 2026 and is forecast to reach USD 432.74 billion by 2031 at 4.26% CAGR over 2026-2031.

Rising sustainability mandates, rapid e-commerce expansion, and brand demand for lightweight, high-barrier formats are widening the flexible packaging industry opportunity. Material science breakthroughs, particularly in mono-material structures, are reducing landfill pressure and unlocking new circular revenue streams for converters. Digital printing is compressing launch cycles for niche products, while just-in-time workflows mitigate the earnings volatility caused by polyolefin price swings. Regionally, Asia Pacific’s expanding middle class and manufacturing scale underpin its leadership, whereas the Middle East and Africa’s packaging infrastructure boom is accelerating its catch-up growth.

Key Report Takeaways

* By material type, polyethylene led with 34.12% of flexible packaging industry share in 2025; biodegradable and compostable materials are projected to post the fastest 7.65% CAGR through 2031.
* By product type, pouches captured 46.05% revenue share of the flexible packaging industry size in 2025, while films and wraps are poised for the quickest 5.61% CAGR to 2031.
* By end-use industry, food accounted for 50.78% of the flexible packaging industry size in 2025; pharmaceuticals are forecast to grow at a 6.47% CAGR between 2026-2031.
* By distribution channel, direct sales dominated with 65.10% of the flexible packaging industry share in 2025, whereas indirect channels are expanding at a 5.76% CAGR.
* Asia Pacific held 44.70% of the flexible packaging industry share in 2025, and the Middle East and Africa region is expected to register the highest 6.03% CAGR to 2031.

Key Market Trends

Global Flexible Packaging Market Trends and InsightsDrivers Impact Analysis*

Driver	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Surge in e-commerce demand for lightweight protective mailers in North America	+0.8%	North America, with spillover to Europe and Asia Pacific	Medium term (2-4 years)
Shift of Asian FMCG brands toward mono-material recyclable films to meet EPR mandates	+1.0%	Asia Pacific, particularly India, China, and ASEAN	Long term (≥ 4 years)
Rapid adoption of retort pouches for ready-to-eat meals in Europe	+0.6%	Europe, with growing adoption in North America	Medium term (2-4 years)
Coffee & specialty-drink brands' switch to high-barrier films in South America	+0.4%	South America, particularly Brazil and Colombia	Short term (≤ 2 years)
Investments in digital printing enabling mass customization for cosmetics packs	+0.7%	Global, with concentration in Europe and North America	Medium term (2-4 years)
Growth in cold-chain biologics blister demand boosting pharma flexible packaging			

| +0.5% | North America, Europe, and developed Asia Pacific | Long term (≥ 4 years) |
Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The flexible packaging market hosts a fragmented hierarchy. Market leaders such as Amcor, Mondi, Huhtamaki, and Constantia Flexibles channel capex into recyclable laminates and digital printing assets to capture premium margins. Amcor's planned USD 8.4 billion acquisition of Berry Global would vault it to the apex of flexible packaging capacity, especially in healthcare formats. Huhtamaki's 2024 EBIT uptick stems from portfolio realignment toward blueloop mono-materials and North American egg-carton debottlenecking.

Strategic alliances revolve around chemical-recycling joint ventures and end-to-end circular pilots with brand owners. White-space entrants include biopolymer innovators scaling PHA resins and cloud-native print-on-demand platforms that sidestep large-volume economics. Private-equity backed roll-ups concentrate on mid-tier converters with region-specific barrier know-how, seeking synergies through shared prepress and resin procurement. Competitive intensity remains highest in retort pouches and medical films where qualification barriers deter new entrants. As a result, incumbents focus on cradle-to-grave sustainability credentials and geographic adjacency, shaping a battlefield where technology and ESG metrics decide contract wins.

Flexible Packaging Industry Leaders* Mondi PLC

* Sealed Air Corporation

* Huhtamaki Oyj

* Amcor plc

* Sonoco Products Company

* *Disclaimer: Major Players sorted in no particular order

Scope Methodology P Space

For this study, the flexible packaging market covers packaging products that can be bent or molded, and that are used to protect, carry, and display goods across end users, measured in revenue terms.

Scope exclusions: We exclude the value of the packed product itself and focus only on the packaging material and conversion value.

Segmentation Container

* By Material Type* Plastic* Polyethylene (PE)
* Biaxially Oriented Polypropylene (BOPP)
* Cast Polypropylene (CPP)
* Polyvinyl Chloride (PVC)
* Ethylene-Vinyl Alcohol (EVOH)
* Other Flexible Plastic

* Paper
* Aluminum Foil
* Biodegradable and Compostable Materials

* By Product Type* Pouches
* Bags and Sacks
* Films and Wraps
* Other Product Types

* By End-use Industry* Food* Frozen Food
* Dairy Based Products
* Meat and Seafood
* Baked Snacks and Confectionery
* Fresh Produce
* Other Food Products

* Beverage* Juice and Nectare
* Dairy Based Drinks
* Other Beverages

* Pharmaceutical
* Cosmetics and Personal Care
* Industrial
* Other End -Use Industry

* By Distribution Channels* Direct Sales Channel
* Indirect Sales Channel

* By Geography* North America* United States
* Canada
* Mexico

* Europe* United Kingdom
* Germany
* France
* Italy
* Spain
* Nordics

* Asia Pacific* China
* Japan
* India
* ASEAN
* South Korea
* Australia
* New Zealand

* South America* Brazil
* Argentina
* Chile

* Middle East and Africa* Middle East* United Arab Emirates
* Saudi Arabia
* Turkey
* Rest of Middle East

* Africa* South Africa
* Kenya
* Rest of Africa

Frequently Asked Questions

What is the current flexible packaging market size?

The flexible packaging industry size stands at USD 351.22 billion in 2026 and is projected to reach USD 432.74 billion by 2031.

Which region leads the flexible packaging industry?

Asia Pacific leads with a 44.70% share, supported by urbanization, manufacturing scale, and proactive sustainability regulations.

Which material is growing fastest in flexible packaging?

Biodegradable and compostable polymers show the quickest 7.65% CAGR from 2026-2031 as brands pursue compostable and bio-based options.

How is e-commerce influencing flexible packaging demand?

Online retail growth drives adoption of lightweight, curbside-recyclable mailers and fuels investment in digital printing for personalized packs.

Why are pharmaceuticals important for flexible packaging growth?

Cold-chain biologics and unit-dose formats require high-barrier films, propelling a 6.47% CAGR in pharmaceutical flexible packaging through 2031.

What role does digital printing play in flexible packaging?

Digital presses lower minimum order quantities and enable mass customization, accelerating product launches and reducing inventory waste.