

High-Barrier Packaging Film Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

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

Executive Market Summary

Market Metric	Details
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Base Market Size	USD 1.77 billion
Projected Forecast (2031)	USD 1.77 billion
Growth Rate (CAGR)	7.34 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

![Major players in High-Barrier Packaging Film industry](images/chart_2.png)

![High-Barrier Packaging Film Market (2025 - 2030)](images/chart_3.png)

![High Barrier Packaging Films Market: Market Share by Packaging Product, 2025](images/chart_4.png)

![High Barrier Packaging Film Market: Market Share by Barrier Type, 2025](images/chart_5.png)

![High Barrier Packaging Films Market](images/chart_6.png)

![Amcor Plc, Glenroy, Inc., Celplast Metallized Products Limited, and Huhtamaki Oy](images/chart_7.png)

![Icon](images/chart_8.png)

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

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

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

![ESOMAR](images/chart_17.png)

![GPTW](images/chart_19.png)

Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period
|

2020 - 2031
|

Market Size (2026)
|

USD 1.77 Billion
|

Market Size (2031)
|

USD 2.52 Billion
|

Growth Rate (2026 - 2031)
|

7.34 %
|

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

High-Barrier Packaging Film Market Analysis by Mordor Intelligence

The high barrier packaging films market size in 2026 is estimated at USD 1.77 billion, growing from 2025 value of USD 1.65 billion with 2031 projections showing USD 2.52 billion, growing at 7.34% CAGR over 2026-2031. Rapid adoption of recyclable mono-material films, stronger demand for biologics cold-chain solutions, and surging e-grocery volumes underpin this expansion. The industry is also reacting to tougher Extended Producer Responsibility (EPR) rules that tie fees to recyclability, prompting converters to pivot toward machine-direction-oriented polyethylene (MDO-PE) and solvent-free organic coatings. Resin price volatility, supply pressure for key barrier resins such as PVDC and EVOH, and the capital intensity of new orientation lines are creating a cost pass-through race that rewards integrated players able to hedge raw-material swings.

Key Report Takeaways

- * By packaging product, bags and pouches held 35.02% revenue share in 2025; vacuum skin packs are forecast to post the fastest 9.43% CAGR through 2031.
- * By material, polyethylene accounted for 32.21% of 2025 revenue, while biopolymers are expected to expand at a 10.02% CAGR to 2031.
- * By end-user industry, food and pet food captured 65.12% revenue share in 2025; pharmaceutical and medical applications are projected to grow at an 8.21% CAGR.
- * By barrier type, metallized films led with 41.18% revenue share in 2025, whereas organic-coated films are set to advance at an 8.33% CAGR through 2031.
- * By technology, multilayer co-extrusion (≤ 7 layers) commanded 60.05% revenue share in 2025; mono-material barrier films are projected to grow at a 8.89% CAGR to 2031.
- * By geography, Asia-Pacific dominated with 42.31% revenue share in 2025; the Middle East and Africa is expected to climb at a 9.35% CAGR through 2031.

Key Market Trends

Market Trends and Insights

Drivers Impact Analysis of High-Barrier Packaging Film Market*

Driver |

(~) % Impact on CAGR Forecast |

Geographic Relevance |

Impact Timeline |

Pharma blister boom in biologics and cold-chain logistics

|

+1.2%
|

Global, with concentration in North America and Europe
|

Medium term (2-4 years)

E-grocery surge driving pouch and film demand

|

+0.9%

APAC core, spill-over to North America and Europe

Short term (≤ 2 years)

Shift from rigid to lightweight stand-up pouches in APAC

|

+0.8%
|

APAC, with early adoption in China, India, and ASEAN
|

Medium term (2-4 years)
|

High-protein pet-food formats relying on barrier pouches

|

+0.6%
|

North America and Europe, expanding to APAC

Long term (≥ 4 years)

Mono-material MD0-PE/BOPE adoption for recyclability

|

+1.1%

Europe leading, followed by North America

Long term (≥ 4 years)

NIR-detectable nano-coatings reducing EPR fees

|

+0.7%
|

Europe and select North American states
|

Medium term (2-4 years)
|

Source: Mordor Intelligence
|

Competitive Landscape
Competitive Landscape

Market structure is fragmented. The USD 8.4 billion Amcor-Berry Global merger in April 2025 combines 400 plants, creating scale for recyclable film R&D and procurement leverage that tempers resin price spikes.[3] Amcor, “Amcor Completes Combination with Berry Global,” amcor.com Toppan’s USD 1.8 billion pickup of Sonoco’s thermoformed and flexibles arm delivers ready access to North American food and healthcare customers, shortening commercialisation times for high barrier packaging films Roche lines. Novolex and Pactiv Evergreen’s merger consolidates food-service flexible packaging, providing integrated sheet extrusion, bag making, and compostable film assets.

Strategic focus has moved from sheer capacity to recyclability credentials. Leaders invest in MDO kit, solvent-free coating stations, and near-infrared detectable inks that reduce EPR fees. Mid-tier players chase niche advantages: European start-ups commercialize chitosan-coated BOPE for premium chocolate bars; Asian specialists roll out high-oxygen-barrier heat-shrink sleeves for dairy PET bottles. Patent filings cluster around NIR-detectable coatings and bio-based tie resins, as documented by recent luminescent-varnish work aimed at digital anti-counterfeiting.

Raw-material access dictates competitive positioning. Integrated resin producers such as ExxonMobil and Dow leverage internal ethylene production to smooth price spikes. Convertors without backward integration partner through long-term off-take contracts or vertical deals; for example, Middle Eastern polymer giants supply EVOH blends to European co-extruders under five-year cost-plus formulas. Sustainability credentials now influence procurement, with global CPGs awarding multi-year LTA contracts to film makers that can prove ≥95% mono-material content and confirmed curbside recyclability.

High-Barrier Packaging Film Industry Leaders

*

Amcor plc

*

Cosmo Films Limited

*

Celplast Metallized Products Limited

*

Glenroy, Inc.

*

Huhtamaki Oyj

*

*Disclaimer: Major Players sorted in no particular order

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Scope Methodology P Space

Our study defines the high-barrier packaging film market as flexible mono- or multilayer polymer sheets engineered to hold oxygen, water vapor, aromas, and light below documented limits, which keeps food, beverage, pharmaceutical, and personal-care packs stable for longer.

Scope exclusion: rigid laminates, stand-alone aluminum foils, and commodity stretch or shrink wraps are outside our universe.

Segmentation Container

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By Packaging Product

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Bags and Pouches

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Stand-up Pouches

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Tray-Lidding Films

*

Thermoforming Films

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Stretch and Shrink Wrap

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Blister Base Film

*
Flow-wrap and Sachets

*
Vacuum Skin Packs

*
By Material

*
Polyethylene (LDPE, HDPE, MDO-PE)

*
Polypropylene (BOPP, CPP)

*
Biaxially Oriented Polyethylene Terephthalate (BOPET)

*
Ethylene Vinyl Alcohol Copolymer (EVOH)

*
Polyamide

*
Aluminium Foil

*
Polyvinylidene Chloride (PVDC)

*
Biopolymers (PLA, PHA)

*
Other Material

*
By End-user Industry

*
Food and Pet Food

*
Meat and Seafood

*
Dairy and Cheese

*
Snacks and Confectionery

*
Beverages

*
Pharmaceutical and Medical

*
Personal Care and Cosmetics

*
Electronics

*
Agriculture and Chemicals

*
By Barrier Type

*
Metallized Films

*
Clear High-Barrier Films

*
Organic-coated Films

*
Inorganic Oxide Films

*
By Technology

*

Multilayer Co-extrusion (>7 layers)

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High-layer (>7) Co-extrusion

*

Mono-material Barrier Films

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Other Technology

*

By Geography

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North America

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United States

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Canada

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Mexico

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Europe

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Germany

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United Kingdom

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France

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Italy

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Spain

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Russia

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Rest of Europe

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Asia-Pacific

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China

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Japan

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India

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ASEAN

*
Australia and New Zealand

*
Rest of Asia-Pacific

*
Middle East and Africa

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Middle East

*
Saudi Arabia

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United Arab Emirates

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Turkey

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Rest of Middle East

*
Africa

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South Africa

*
Kenya

*
Rest of Africa

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South America

*
Brazil

*
Argentina

*
Rest of South America

Frequently Asked Questions

What is the current size of the high barrier packaging films market?

The high barrier packaging films market reached USD 1.77 billion in 2026 and is projected to climb to USD 2.52 billion by 2031 at a 7.34% CAGR.

Which region leads the high barrier packaging films market?

Asia-Pacific dominates with 42.31% of 2025 revenue thanks to rapid conversion from rigid containers to flexible pouches.

Why are mono-material films gaining ground?

Retailers and regulators impose EPR fees on non-recyclable packs, so brands adopt mono-material MDO-PE or BOPE structures that meet curbside recycling guidelines while retaining barrier performance.

Which packaging product segment is growing fastest?

Vacuum skin packs show a 9.43% CAGR through 2031 because they extend chilled shelf life and improve product visibility, benefitting fresh meat and seafood suppliers.

What restrains market growth?

Volatile polyethylene and polypropylene prices and a looming supply squeeze for PVDC and EVOH resins after 2027 create cost and sourcing challenges for converters.

How are leading companies responding to sustainability pressures?

Firms invest in MDO lines, solvent-free organic coatings, and NIR-detectable inks, while mergers such as Amcor-Berry Global create scale to fund recyclable barrier technology rollouts.