Stand-Up Pouches Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

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

Executive Market Summary

Market Metric	Details
Base Market Size	USD 15.27 billion
Projected Forecast (2031)	USD 15.27 billion
Growth Rate (CAGR)	5.29 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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![Major players in Stand-Up Pouches industry](images/chart_2.png)

![Stand-Up Pouches Market (2026 - 2031)](images/chart_3.png)

![Stand-Up Pouches Market: Market Share by Material Type](images/chart_4.png)

![Stand-Up Pouches Market: Market Share by Application](images/chart_5.png)

![Stand-Up Pouches Market CAGR (%), Growth Rate by Region](images/chart_6.png)

![Stand-Up Pouches Market-Market Concentration.png](images/chart_7.png)

![Icon](images/chart_8.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 OverviewStudy Period | 2023 - 2031 |
Market Size (2026) | USD 15.27 Billion |
Market Size (2031) | USD 19.76 Billion |
Growth Rate (2026 - 2031) | 5.29 % |
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

Stand-Up Pouches Market Analysis by Mordor IntelligenceThe stand-up pouches market size was valued at USD 14.42 billion in 2025 and is estimated to grow from USD 15.27 billion in 2026 to USD 19.76 billion by 2031 at a 5.29% CAGR over 2026-2031. Sustained demand for convenient, lightweight packaging, tightening sustainability regulations and a wave of rigid-to-flexible conversions keep the stand-up pouches market on a steady growth path. Manufacturers are deploying mono-material laminates to comply with Europe’s Packaging and Packaging Waste Regulation 2025/40 and emerging U.S. extended-producer-responsibility laws, while brand owners in food, personal care, and beverages accelerate adoption to curb logistics costs and shrink carbon footprints. Capital investment in solventless lamination, machine-direction orientation, and digital printing is surging as converters race to unlock recycle-ready formats, support short production runs, and embed traceability features. Competitive intensity has deepened after Amcor finalized the USD 8.43 billion Berry Global deal in May 2025 and ProAmpac announced a USD 1.51 billion agreement to acquire TC Transcontinental Packaging in December 2025, moves that realign global film extrusion and pouching capacity. Persistent raw-material volatility around ethylene-vinyl-alcohol (EVOH) and nylon resins and the lack of curbside collection for multi-layer laminates remain structural headwinds, but ongoing capacity expansions in barrier-paper, mono-polyethylene and aseptic pouch lines give the stand-up pouches market additional resilience.

Key Report Takeaways* By material type, plastic led with 62.13% of 2025 revenue, while biodegradable and compostable alternatives are projected to expand at a 6.07% CAGR through 2031.
* By product type, round-bottom (Doyen) pouches accounted for 40.32% of volume in 2025, whereas flat-bottom variants are forecast to post a 6.24% CAGR owing to shelf-stacking efficiencies.
* By application, food accounted for 56.24% of global volume in 2025, yet personal care and cosmetics pouches are set to grow at a 6.32% CAGR, driven by refill and subscription models.
* By distribution channel, direct sales captured 69.42% of the 2025 value, but online channels are set to rise at a 5.69% CAGR as digitally printed, low-MOQ programs proliferate.
* By geography, Asia-Pacific represented 41.87% of 2025 revenue, while the Middle East and Africa region is expected to see the quickest regional climb at a 6.23% CAGR through 2031.

Key Market Trends

Market Trends and InsightsDrivers Impact Analysis of Stand-Up Pouches Market*

Driver	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Rising demand for convenient lightweight food packaging	+1.2%	Global, early gains in North America, Western Europe, urban Asia-Pacific	Short term (≤ 2 years)
Sustainability regulations pushing mono-material recyclable pouch adoption	+1.3%	Europe, North America, spillover to Asia-Pacific	Medium term (2-4 years)
Cost savings from rigid-to-flexible conversions	+1.0%	North America and Europe, spillover to South America	Medium term (2-4 years)
Growth in e-commerce and on-the-go consumption	+0.9%	China, United States, Brazil	Short term (≤ 2 years)
Aseptic dairy expansion in Sub-Saharan Africa boosting aluminum-free pouches	+0.6%	Kenya, Nigeria, Ethiopia	Long term (≥ 4 years)
Nordic beauty refill culture accelerating easy-pour SKUs	+0.3%	Sweden, Norway, Denmark	Medium term (2-4 years)

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The global stand-up pouches market displays moderate-to-high concentration: the top five players, Amcor, Mondi, Berry Global, Sonoco, and Sealed Air, command roughly 40-45% combined capacity. Amcor's USD 8.43 billion integration of Berry Global cements a powerhouse controlling extrusion, lamination, and printing across four continents, expediting global mono-material roll-outs. ProAmpac's USD 1.51 billion deal for TC Transcontinental Packaging, pending closure in early 2026, fortifies its food and pet-food franchise and adds barrier-paper know-how. Constantia Flexibles and Mondi funnel more than EUR 1.3 billion (USD 1.47 billion) into solventless laminators and MDO films, underscoring the capital heft needed to pivot away from mixed laminates.

Digitally focused challengers such as ePac carve out the short-run, high-mix niche, leveraging 58 HP Indigo presses slated for Gen5 upgrades. Their distributed network reduces freight miles and turnaround times, luring start-ups to sidestep traditional brokers. Technology leadership is also visible in SIG's in-line aseptic spout system, which trims sterilization steps, and Winpak's ReForm mono-material range that eliminates EVOH layers. Regional converters battle raw-material volatility, lacking Amcor-style scale to hedge resin costs, and often seek private-equity backing to fund upgrades.

Quality and sustainability certifications have become de facto barriers to entry. ISO 9001 and ISO 22000 registration appear in bid packets for multinational FMCGs. Converters failing to demonstrate closed-loop traceability risk exclusion from new product launches. On the opportunity side, rapid adoption of tethered caps and digitized traceability marks presents room for IP-driven differentiation. Overall, M&A momentum suggests further consolidation as buyers chase economies of scale and toolbox breadth.

Stand-Up Pouches Industry Leaders* Mondi PLC

* Sonoco Products Company

* Constantia Flexibles GmbH

* ProAmpac LLC

* Amcor Plc

* *Disclaimer: Major Players sorted in no particular order

Component Component 3 Scope Of The Report Bottom

Global Stand-Up Pouches Market Report ScopeThe Stand-Up Pouches Market Report is Segmented by Material Type (Plastic, Paper, Metal Foil, Biodegradable and Compostable Materials), Product Type (Doyen or Round Bottom, K-Seal, Plow or Corner Bottom, Flat Bottom, Other Product Types), Application (Food, Beverage, Personal Care and Cosmetics, Healthcare and Pharmaceuticals, Industrial and Household Chemicals, Other Application), Distribution Channel (Direct Sales, Indirect Sales), and Geography (North America, Europe, Asia-Pacific, Middle East, Africa, South America). The Market Forecasts are Provided in Terms of Value (USD).

Segmentation OverviewBy Material TypePlastic | Polyethylene Terephthalate (PET) |
| Polyethylene (PE) |
| Polypropylene (PP) |
| Ethylene Vinyl Alcohol Copolymer (EVOH) |
| Other Plastics |

Paper |
Metal Foil |
Biodegradable and Compostable Materials |

Segmentation Accordion Item

By GeographyNorth America | United States |
| Canada |
| Mexico |
Europe | Germany |
| United Kingdom |
| France |
| Italy |
| Spain |
| Russia |
| Rest of Europe |
Asia-Pacific | China |
| India |
| Japan |
| South Korea |
| Australia and New Zealand |
| Rest of Asia-Pacific |
Middle East | United Arab Emirates |
| Saudi Arabia |
| Turkey |
| Rest of Middle East |
Africa | South Africa |
| Nigeria |
| Egypt |
| Rest of Africa |
South America | Brazil |
| Argentina |
| Rest of South America |

Frequently Asked Questions

How fast will global demand for stand-up pouches grow between 2026 and 2031?

The market is projected to advance at a 5.29% CAGR, lifting value from USD 15.27 billion in 2026 to USD 19.76 billion by 2031.

Which material type shows the quickest expansion?

Biodegradable & Compostable materials are on track for a 6.07% CAGR through 2031.

Why are flat-bottom pouches gaining popularity at retail?

Their stable base removes the need for secondary cartons, cuts logistics costs by up to 20% and offers a larger print area for branding.

What is the biggest regulatory force shaping material choice?

The EU Packaging and Packaging Waste Regulation 2025/40 sets recyclability and PFAS bans that accelerate the shift to mono-material laminates.

Which region is expected to post the strongest growth?

The Middle East and Africa region is forecast to rise at a 6.23% CAGR, supported by new aseptic dairy lines and expanding agribusiness exports.

How concentrated is supplier power in this space?

The combined share of the five largest converters stands near 42%, giving the market a moderately consolidated profile.