

Food Packaging

Industry

*Current, Future Potential, Market
Trends*

Introduction

Packaging is one of the fastest growing industries and stands at USD 700 billion globally. It has grown higher than GDP in most of the countries. In developing country like India, it grew at a CAGR of 16% in the last five years and touched ~USD 32 Bn in FY 15. The Indian packaging industry constitutes ~4% of the global packaging industry.

The per capita packaging consumption in India is low at 4.3 kgs, compared to developed countries like Germany and Taiwan where it is 42 kgs and 19 kgs respectively. However in the coming years Indian packaging industry is expected to grow at 18% p.a. wherein, the flexible packaging is expected to grow at 25 % p.a. and rigid packaging to grow at 15 % p.a.

The food packaging industry is vibrant and highly competitive, with food manufacturers always on the look-out for packaging that can provide consumers with increased convenience as well as longer shelf life at a lower cost than their existing packaging. The food industry is well aware that consumers want innovation and value novelty, and therefore the packaging industry must innovate or stagnate.

The growth of the global packaging industry is being driven by a number of trends, depending on various geographical regions. Growing urbanisation, investment in housing and construction, the development of retail chains and the burgeoning healthcare and cosmetics sectors are driving packaging demand in China, India, Brazil, Russia and other emerging economies.

An increase in living standards and personal disposable income in the developing regions fuels consumption across a broad range of products, with subsequent growth in demand for the packaging of these goods.

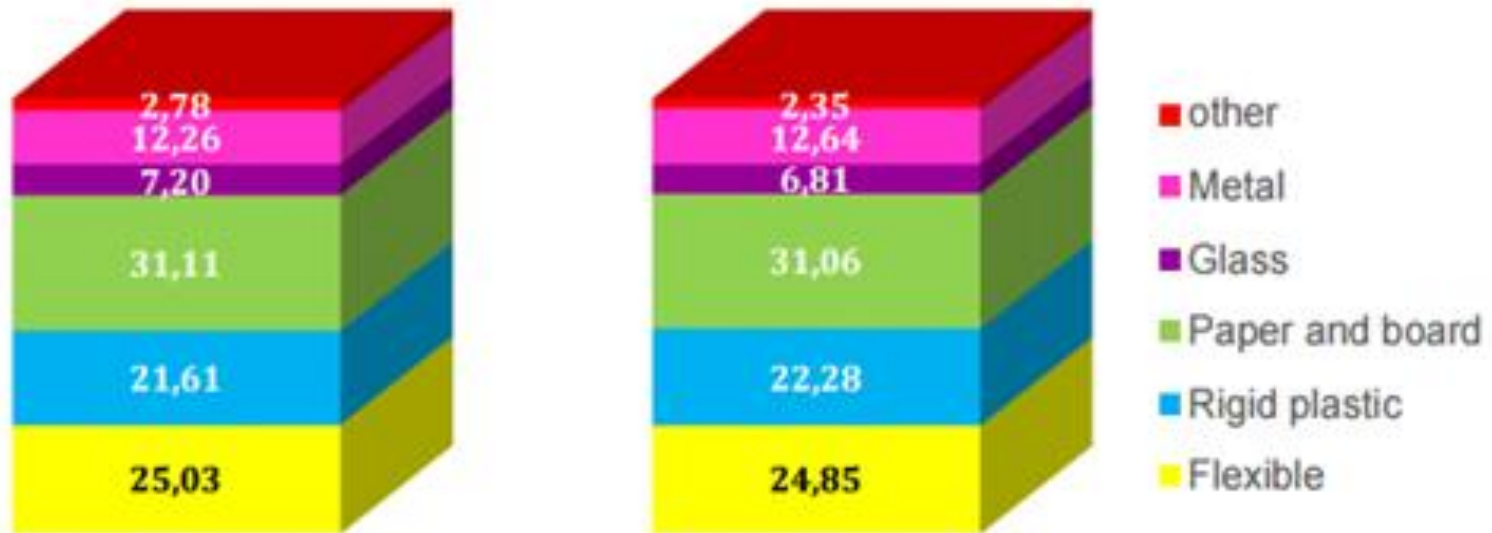
In the dynamic food and beverage industry, manufacturers constantly need to not only cope with increasing consumer demands, but also keep up with the latest trends and continuously innovate to retain consumer interest. Consumers favour brands and products with 'clean-label' messaging that enhances brand transparency and builds purchasing confidence. The term refers to products that are free from artificial ingredients and are natural or organic.

Brand owners, design agencies and packaging manufacturers are increasingly incorporating this messaging into packaging materials. The sustainability agenda means weight reduction and the recycling of packaging has become key. Packaging must be adaptive, diverse and complex.

The global packaging market is divided into five main categories of materials: plastics, paper and board, glass, metal and wood (textile is marginal). For many years, this market has been seeing growth in the use of rigid plastic materials and flexible materials.

In terms of packaging units, the main packaging materials used in the world are also flexible materials (36%), paper and board (24%) and rigid plastic materials (20%). The most used types of packaging are bags and sachets (875.59 billion units), bottles (810.32 billion) and cans (412.95 billion).

SHARE (%) OF MATERIALS IN VALUE



2015 (Total: \$ 839 Billion)

2020 (Total: \$ 998 Billion)

➤ **Rigid Plastics Record the Highest Growth Rate**

PET global consumption is set to reach 21.1 million tonnes in 2021 thanks to technological developments, such as packaging for milk and the ability to fill hot sauces and cooking preparations.

Africa, the Middle East and Asia will be the largest consumers of rigid plastic packaging in the next five years. Inversely, on markets like Australia, demand for carbonated drinks, water and food products seems to be saturated and is moving towards soft plastic packaging as new growth sources.

➤ **Slower Growth for Flexible Materials**

The demand for flexible packaging (paper, plastic, complex/multi-layer materials) has greatly developed in the last decade. Technological leaps and the macro-environment have transformed this packaging, initially perceived as low-cost, into a must-have in terms of quality for a multitude of applications.

This market is forecast to grow at an annual average rate of 3.4% over the next five years, to reach USD248 billion by 2020.

Asia is forecast to remain the biggest market, progressing from 42% of market share in 2015 to nearly 45% in 2020, ahead of Eastern Europe.

➤ **Paper and Board Packaging**

The expansion of on-line commerce is beneficial to board packaging in countries where this material dominates, such as in China where Alibaba ships 12 million parcels per day, and in India.

And board packaging is changing because over 30% of on-line purchases are returned – hence the necessity for packaging that is easy to open and to reseal – and because e-commerce places emphasis on packaging to maximise the customer experience.

➤ **Stability for Metal Packaging**

Metal packaging follows the trends of the global packaging market. Demand comes from Asia, driven by China, and particularly focuses on aerosols for personal hygiene products, cosmetics and cleaning products. On Western European and North American markets, canned foods are being impacted by competition from flexible packaging and by consumers' demand for fresh fruit and vegetables.

➤ **Luxury Goods: A Favoured Segment for Glass Packaging**

Glass is one of the most preferred materials for packaging of food, beverages, pharmaceuticals, personal care products, among others. Properties like non-reaction with other chemicals, sterility, and reusability make it an excellent packaging material. Glass packaging is forecast to record the lowest growth rate by 2020, at USD63.87 billion.

Mainly dedicated to drinks and perfume, it has become a symbol of luxury, and sometimes transgression, with highend and sophisticated creations. Champagne is multiplying its limited series, wines are targeting women with bright colours, beers are using premium packaging with PSL labels for a "label-free" look. Frosted glass, tactile effects and unique shapes are revitalising this material.

Even though glass remains the preferred packaging material for a variety of products, the growing use of plastics as a replacement for glass will hamper market growth. Advancements in the field of plastics for safe usage in different applications will restrict glass as a material for packaging.

➤ **Wooden Packaging**

Wooden packaging, mainly pallets and crates, essentially concerns industrial packaging. Following the growth of the global logistics industry, production of pallets reached 73.6 million Euro pallets, with over 91% of these pallets being made from wood.

➤ **Top Trends Affecting Global Packaging**

- Greater consumer awareness of health and wellness.
- Stronger influence of recycling and environmental issues.
- Increasing disposable income and purchasing power.

➤ **Global Packaging Trends**

There's a parallel path between brands striving to engage consumers on a more personal level and consumers' expectations for packaging to deliver that experience.

Here are the five key trends set to impact the global packaging industry – a look at the “next generation” brand challenges, consumer needs and packaging innovations set to transform the global packaging industry in 2017.

➤ **The [Re] Union of Package Structure and Branding**

The time is now for brands to roll out unique packaging structures that not only differentiate on shelf, but also help form and support brand identity.

➤ **The Face and Role of Packaging Online**

As e-commerce grows, brands must explore both the opportunities and threats that this can bring, as the shift from in-store to shopping becomes a core part of the packaging design conversation and brief.

➤ **Packaging Gets Smart, Active and Intelligent**

While there is a lack of standardized definitions for smart, active, intelligent, and even mobile-enabled packaging, there are still clear and measurable connections with consumers and in some cases it is even saving lives.

➤ **The Experience of Packaging**

Packaging design has become dominated by the need for brand recognition and variant identification and information. Consumers are increasingly looking for brands to entertain and engage them.

➤ **Extend My Brand**

Price is a key factor in consumers' purchasing decisions, but brand trust also plays a pivotal role. Brands can leverage trust to create loyalty and extend a product portfolio well beyond traditional categories.

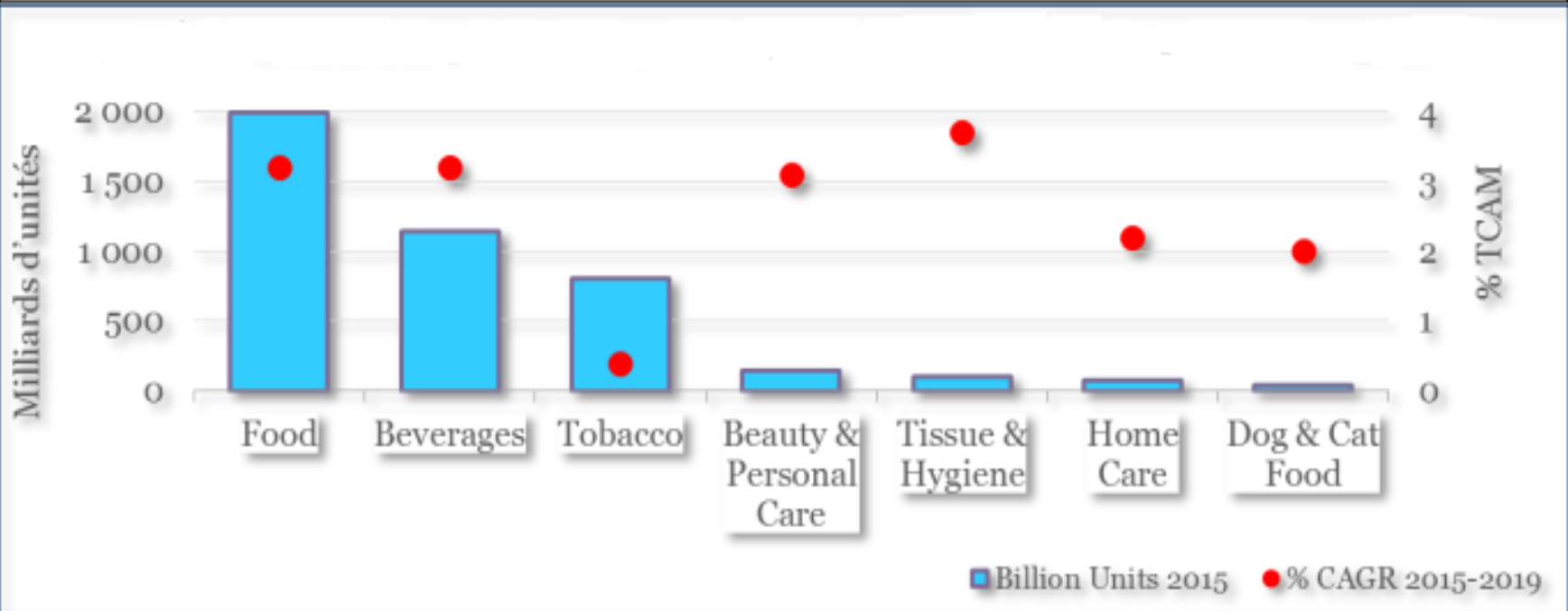
➤ **Conclusion**

The global packaging industry is rapidly consolidating in response to a number of societal trends as well as the drive towards far greater sustainability and the rise of e-commerce. Sustainability issues have enhanced the focus and presence of light weighting upon the industry.

It has become a common trend for packaging converters to reduce the weight of their products in order to reduce costs associated with transportation, reduce CO2 emissions, and to help create a more sustainable supply chain. In the last 20 years, the weight of an average 50cl plastic bottle has come down by around 50%. Light weighting is also occurring in other markets such as metal, glass, and board.

Global Packaging Market

GLOBAL PACKAGING MARKET BY SECTOR IN 2015 AND GROWTH FOR 2019



In view of demand from developing economies, the beauty and hygiene sectors are forecast to record the highest growth by 2019, not forgetting consumer electronics, pet food, and household products.

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Tags

Food Packaging, Food Packaging Materials, Packaging Material for Food Products, Food Processing & Packaging, Food Packaging Methods, Packaging Material for Food, Food Packaging and Processing, Food Processing & Packaging Equipment, Food Processing & Packaging Machinery, Food Packaging Plants, How to Start Food Packaging Business, Starting Food Processing Business, Food Processing Business Plan India, Food Packaging Business Ideas, How to Start Food Packaging Business in India, How Food Processing and Packaging, Business Plan Food Packaging, Setting Up and Running Small Food Business, Start Your Own Food Business, How to Start Packaged Food Business, Business Plan for Food Packaging Industry, Profitable Food Processing Business Ideas, Food Processing Guide, Wooden Packaging, Wooden Packaging Material, Wood Packaging Material, Treatment of Wooden Packaging, Wooden Packing Industry, Industrial Wooden Packaging, Plant for Wood Packaging, Wooden Packaging Business, Wooden Packaging Manufacturing, Wooden Food Packaging, Manufacturing of Wooden Packaging, Manufacture of Wooden Packaging, Glass Food Packaging, Glass Packaging, Glass Packaging Materials, Glass Packaging Industry, Glass Packaging Machine, Glass Packing Business Line, Packaging for Glass, Production of Glass Packaging, Glass Packaging Production, Glass Packaging Plant, Metal Packaging, Metal Packaging Industry, Metal Food Packaging, Machines for Metal Packaging Industry,

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NIIR PROJECT CONSULTANCY SERVICES

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- *We adopt a systematic approach to provide the strong fundamental support needed for the effective delivery of services to our Clients' in India & abroad*



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- *Business Plan*
- *Industry Trends*
- *Market Research Reports*
- *Technology Books and Directory*
- *Databases on CD-ROM*
- *Laboratory Testing Services*
- *Turnkey Project Consultancy/Solutions*
- *Entrepreneur India (An Industrial Monthly Journal)*



How are we different ?

- *We have two decades long experience in project consultancy and market research field*
- *We empower our customers with the prerequisite know-how to take sound business decisions*
- *We help catalyze business growth by providing distinctive and profound market analysis*
- *We serve a wide array of customers , from individual entrepreneurs to Corporations and Foreign Investors*
- *We use authentic & reliable sources to ensure business precision*



Our Approach

Requirement collection

Thorough analysis of the project

Economic feasibility study of the Project

Market potential survey/research

Report Compilation

Who do we serve?

- *Public-sector Companies*
- *Corporates*
- *Government Undertakings*
- *Individual Entrepreneurs*
- *NRI's*
- *Foreign Investors*
- *Non-profit Organizations, NBFC's*
- *Educational Institutions*
- *Embassies & Consulates*
- *Consultancies*
- *Industry / trade associations*

Sectors We Cover

- *Ayurvedic And Herbal Medicines, Herbal Cosmetics*
- *Alcoholic And Non Alcoholic Beverages, Drinks*
- *Adhesives, Industrial Adhesive, Sealants, Glues, Gum & Resin*
- *Activated Carbon & Activated Charcoal*
- *Aluminium And Aluminium Extrusion Profiles & Sections,*
- *Bio-fertilizers And Biotechnology*
- *Breakfast Snacks And Cereal Food*
- *Bicycle Tyres & Tubes, Bicycle Parts, Bicycle Assembling*

- *Bamboo And Cane Based Projects*
- *Building Materials And Construction Projects*
- *Biodegradable & Bioplastic Based Projects*
- *Chemicals (Organic And Inorganic)*
- *Confectionery, Bakery/Baking And Other Food*
- *Cereal Processing*
- *Coconut And Coconut Based Products*
- *Cold Storage For Fruits & Vegetables*
- *Coal & Coal Byproduct*

- *Copper & Copper Based Projects*
- *Dairy/Milk Processing*
- *Disinfectants, Pesticides, Insecticides, Mosquito Repellents,*
- *Electrical, Electronic And Computer based Projects*
- *Essential Oils, Oils & Fats And Allied*
- *Engineering Goods*
- *Fibre Glass & Float Glass*
- *Fast Moving Consumer Goods*
- *Food, Bakery, Agro Processing*

- *Fruits & Vegetables Processing*
- *Ferro Alloys Based Projects*
- *Fertilizers & Biofertilizers*
- *Ginger & Ginger Based Projects*
- *Herbs And Medicinal Cultivation And Jatropha (Biofuel)*
- *Hotel & Hospitability Projects*
- *Hospital Based Projects*
- *Herbal Based Projects*
- *Inks, Stationery And Export Industries*

- *Infrastructure Projects*
- *Jute & Jute Based Products*
- *Leather And Leather Based Projects*
- *Leisure & Entertainment Based Projects*
- *Livestock Farming Of Birds & Animals*
- *Minerals And Minerals*
- *Maize Processing(Wet Milling) & Maize Based Projects*
- *Medical Plastics, Disposables Plastic Syringe, Blood Bags*
- *Organic Farming, Neem Products Etc.*

- *Paints, Pigments, Varnish & Lacquer*
- *Paper And Paper Board, Paper Recycling Projects*
- *Printing Inks*
- *Packaging Based Projects*
- *Perfumes, Cosmetics And Flavours*
- *Power Generation Based Projects & Renewable Energy Based Projects*
- *Pharmaceuticals And Drugs*
- *Plantations, Farming And Cultivations*
- *Plastic Film, Plastic Waste And Plastic Compounds*
- *Plastic, PVC, PET, HDPE, LDPE Etc.*

- *Potato And Potato Based Projects*
- *Printing And Packaging*
- *Real Estate, Leisure And Hospitality*
- *Rubber And Rubber Products*
- *Soaps And Detergents*
- *Stationary Products*
- *Spices And Snacks Food*
- *Steel & Steel Products*
- *Textile Auxiliary And Chemicals*

- *Township & Residential Complex*
- *Textiles And Readymade Garments*
- *Waste Management & Recycling*
- *Wood & Wood Products*
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