Active Packaging Inserts

ANMD-MRS5-045 · Sustainable Packaging

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US$

WHY THIS REPORT

Active packaging inserts extend shelf life and cut food waste by managing the in-pack environment, turning passive packaging into an active preservation system. This decision-grade study sizes the global market three ways — value, units and volume — across insert type, active mechanism and application, across seven regions and four scenarios to 2032, with outlooks to 2050.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report's backbone, not an afterthought. Beyond function, active packaging inserts deliver measurable extended shelf life, reduced spoilage and lower food waste, while less food waste and longer shelf life strengthen the resource-efficiency story.

Mapped Sustainable Development Goals:

SDG 2	SDG 12	SDG 13
Zero Hunger	Responsible Consumption	Climate Action

Measurable sustainability outcomes assessed:

- Extended shelf life and reduced spoilage
- Lower food and product waste
- In-pack oxygen, moisture and ethylene control
- Insert recyclability, end-of-life separation and supply-chain ESG as material risks

Framework alignment: Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

WHAT'S INSIDE AT A GLANCE

53 Chapters	**9** Report Parts	**7** Regions Covered	**40+** Country Markets
2025–32 Forecast Horizon	**4** Forward Scenarios	**25+** Companies Profiled	**3** SDGs Mapped

REPORT COVERAGE

Geographic scope: North America, Europe, Asia Pacific, Latin America, Africa, Middle East and Rest of World — with named country intelligence. Europe is the policy leader (Germany, France, Italy) on packaging regulation and compostability standards; North America is the value leader (United States, Canada) on brand commitments; Asia Pacific is the scale engine; other regions assessed on their own merits.

MARKET OVERVIEW

From early adoption to mainstream scale — where packaging goes active, preserving and waste-reducing.

The active packaging inserts market is moving from early adoption to mainstream commercial scale. Demand is driven by food-waste-reduction and shelf-life pressure converging with brand and regulatory commitments, supported by strong momentum across Asia Pacific, North America and Europe. The market is read three ways — value, units and volume — and forecast under four scenarios, each region reported separately.

- **Asia Pacific is the scale engine** — China, Japan and India, on food packaging and volume
- **North America is the value leader** — United States and Canada, on food-safety and retail demand
- **Europe is the technology leader** — Germany, France and United Kingdom, on active-packaging regulation
- **Shelf-life extension is the differentiator** — oxygen, moisture and ethylene control plus spoilage reduction

REGIONAL OUTLOOK

Across seven reporting regions, the report separates early commercialisation leaders from high-growth and emerging markets — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Markets & Drivers
Europe	Policy leader	Germany, France, Italy — packaging regulation, compostability standards
North America	Value leader	United States, Canada — brand commitments, retail demand
Asia Pacific	Scale engine	China, Japan, India — capacity, feedstock
Middle East	High-growth	Saudi Arabia, UAE — sustainability investment
Latin America	Emerging	Brazil, Mexico — packaging demand
Africa	Emerging	South Africa, Nigeria — access, packaging supply

KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
• Food-waste-reduction + shelf-life convergence • Spoilage reduction & food-safety value • Policy support (food-waste, food-safety regulation) • Cost-benefit & loss-avoidance economics • Scavenger, absorber & antimicrobial technology gains	• Cost addition per pack • Insert separability & recyclability at end-of-life • Regulatory & food-contact approval burden • Active-material, supply-chain & price volatility • Standards, labelling & claim-substantiation scrutiny

SEGMENTATION SNAPSHOT

By Insert Type	Oxygen scavengers · moisture absorbers / desiccants · ethylene absorbers · antimicrobial · CO_2 emitters / absorbers
By Mechanism	Absorbing · scavenging · emitting / antimicrobial
By Application	Food & beverage · pharma & nutraceuticals · produce & electronics
By End User	Brand owners · converters · retailers · CPG & food producers · packaging buyers
By Business Model	Direct sale · converter-supplied · private-label · service / managed-supply
By Scale	Regional · national · global supply

TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans global packaging majors, specialist active packaging inserts makers, and emerging innovators. Deal activity — M&A, technology acquisition and platform expansion — signals a market consolidating around scalable, sustainable packaging platforms.

Representative players profiled in the full report:

Multisorb (Filtration Group Corporation) · Mitsubishi Gas Chemical Company, Inc. · Clariant AG · Sealed Air Corporation · CSP Technologies, Inc. · and 20+ further profiled players across biopolymer producers, converters and emerging innovators.

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a Go / No-Go / Conditional-Go investment verdict.

KEY QUESTIONS THIS REPORT ANSWERS

- ? How large is the global active packaging inserts market, and how fast will it grow to 2032?
- ? Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- ? How do compostability and circularity change value versus fossil-plastic incumbents?
- ? Who leads, and where is the competitive and patent white space?
- ? Is the investment case bankable — and under what conditions?
- ? How does the category align with the SDGs, circular-economy and resource-security and disclosure regulation?

WHY ANMD — THE DIFFERENCE

Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate, water and natural-capital intelligence and a decision-ready bankability verdict in a single architecture.

- **Triangulated sizing** — every market read three ways so value, volume and area views reconcile rather than conflict.
- **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear Go / No-Go / Conditional-Go investment verdict.

WHO SHOULD BUY THIS REPORT

Investors and packaging / PE funds, biopolymer producers and converters, brand owners and CPG companies, retailers and packaging buyers, procurement and sustainability leaders, regulators and standards bodies, and corporate strategy and ESG teams.

Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at **www.anewmarketdynamics.com** · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at **www.anewmarketdynamics.com**. The full detailed table of contents will be sent directly to your registered company email address.