ANMD-MRS33-321 · Sustainable Packaging Innovations

Compostable Films

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

Compostable films replace conventional plastic flexibles with PLA, PHA and starch-blend materials that break down in industrial or home composting, closing the loop on food packaging, produce bags and agricultural mulch. This decision-grade study sizes the global market three ways — value, tonnes produced and film volume — across material type, structure 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 plastic substitution, compostable films deliver measurable plastic-waste diversion, fossil-feedstock reduction and organic-recycling compatibility, while soil-safe degradation strengthens the natural-capital story.

Mapped Sustainable Development Goals:

SDG 2	SDG 6	SDG 7	SDG 13	SDG 15
Zero Hunger	Clean Water	Affordable Clean Energy	Climate Action	Life on Land

Measurable sustainability outcomes assessed:

- Diverted plastic waste through certified compostability
- Reduced fossil-feedstock dependence via biopolymer materials
- Organic-recycling compatibility in real collection systems
- Feedstock land-use and compostability-claim integrity 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	**5** 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 leads regulation-driven adoption; Asia Pacific is the scale engine on biopolymer supply; North America accelerates on bans and brand pledges.

MARKET OVERVIEW

From niche to mainstream flexible packaging — where certified end-of-life gates retailer adoption.

The compostable films market is moving from niche to mainstream flexible packaging. Demand is driven by the convergence of plastic-waste regulation with brand sustainability commitments and composting-infrastructure growth, supported by maturing biopolymer supply. The market is read three ways — value, tonnes produced and film volume — and forecast under four scenarios, each region reported separately.

- Europe leads regulation-driven adoption — Italy, France, Germany and the Nordics, on plastic bans and EPR
- Asia Pacific is the scale engine — China, Japan, India and Australia on biopolymer supply and packaging demand
- Material type and application segment the value — across PLA, PHA and starch-blend films
- Certified end-of-life is the differentiator — compostability certification conventional plastics cannot meet

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	Regulation leader	Italy, France, Germany, Nordics — plastic bans, EPR, organic-waste collection
Asia Pacific	Scale engine	China, Japan, India, Australia — biopolymer supply, packaging demand
North America	Accelerating	United States, Canada — state bans, brand pledges, composting growth
Latin America	Emerging	Brazil, Chile — agricultural mulch, plastic-reduction policy
Africa	Frontier	South Africa, Kenya — plastic-bag bans, agricultural applications
Middle East	Frontier	UAE, Saudi Arabia — sustainability mandates, foodservice packaging

KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
• Single-use-plastic bans and EPR regulation	• Price premium versus conventional plastic film
• Brand sustainability and plastic-reduction pledges	• Composting-infrastructure and collection gaps
• Organic-waste collection and composting growth	• Barrier and shelf-life performance limits
• Biopolymer cost-down and performance gains	• Certification, labelling and greenwashing scrutiny
• Consumer demand for plastic-free packaging	• Feedstock and biopolymer supply constraints

SEGMENTATION SNAPSHOT

By Material Type	PLA-based · PHA-based · starch-blend films
By Structure	Monolayer · multilayer · coated / laminated
By Component	Biopolymer resins · additives · extrusion · coatings · printing
By Application	Food packaging · produce / bags · agricultural mulch
By End User	Brand owners · converters · retailers · foodservice
By Deployment Scale	Pilot · distributed · commercial-scale

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.

Part I — Report Foundation, Discovery and Strategic Intelligence

- Chapter 1. Scope, Methodology and Report Architecture
- Chapter 2. Industry Discovery Summary — Compostable Films
- Chapter 3. Executive Intelligence and Decision Dashboard
- Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

Part II — Market Intelligence, Sizing, Forecasting and Segmentation

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- Chapter 8. Market Segmentation Analysis
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- Chapter 21. Category-Specific Intelligence Module
- Chapter 22. Research, Innovation and Funding Landscape

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- Chapter 24. Company Profiles
- Chapter 25. Mergers, Acquisitions, Partnerships and Ecosystem Intelligence
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- Chapter 50. Project Intelligence Annex
- Chapter 51. Forecast Annex
- Chapter 52. Sustainability KPI Annex
- Chapter 53. Reference Annexes

COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans biopolymer producers, film converters and compostable-packaging specialists. Deal activity — biopolymer capacity expansion, brand-owner partnerships and certification agreements — signals a market consolidating around bankable, repeatable designs.

Representative players profiled in the full report:

BASF SE · NatureWorks LLC · Novamont S.p.A. · TIPA Corp. Ltd. · Futamura Group · and further profiled players across the value chain.

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a clear, condition-based investment view.

KEY QUESTIONS THIS REPORT ANSWERS

- ? How large is the global compostable films market, and how fast will it grow to 2032?
- ? Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- ? Who leads, and where is the competitive and patent white space?
- ? Is the investment case bankable — and under what conditions?
- ? How does the technology align with the SDGs and emerging 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 assessment in a single architecture.

- › **Triangulated sizing —** every market read three ways (value, tonnes produced and film volume) so value, volume and film volume 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, condition-based bankability view.

WHO SHOULD BUY THIS REPORT

Investors and infrastructure / PE funds, biopolymer manufacturers, film converters, brand owners, retailers, agribusiness, research institutions, lenders, policymakers, 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.