Mono-Material Flexible Packaging

ANMD-MRS5-047 · 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

Mono-material flexible packaging redesigns multi-layer films into single-polymer structures, turning unrecyclable laminates into recycle-ready flexible packaging. This decision-grade study sizes the global market three ways — value, tonnes and film area — 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 function, mono-material flexible packaging delivers measurable recyclability, design-for-circularity and reduced multi-material waste, while single-polymer design and recycling-readiness strengthen the circular-economy story.

Mapped Sustainable Development Goals:

SDG 12	SDG 13	SDG 14
Responsible Consumption	Climate Action	Life Below Water

Measurable sustainability outcomes assessed:

- Recyclability and design-for-circularity
- Reduced multi-material laminate waste
- Single-polymer, recycling-ready structures
- Material sourcing, recyclability infrastructure 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 flexible films go single-polymer, recycle-ready and circular.

The mono-material flexible packaging market is moving from early adoption to mainstream commercial scale. Demand is driven by circularity and design-for-recycling pressure converging with brand and regulatory commitments, supported by strong momentum across Europe, North America and Asia Pacific. The market is read three ways — value, tonnes and film area — and forecast under four scenarios, each region reported separately.

- **Europe is the policy leader** — Germany, France and Italy, on recyclability rules and EPR
- **North America is the value leader** — United States and Canada, on brand commitments and retail demand
- **Asia Pacific is the scale engine** — China, Japan and India, on film-conversion capacity
- **Recycling-readiness is the differentiator** — single-polymer design plus retained function

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
• Circularity + design-for-recycling convergence • Brand-owner & retailer recyclability targets • Policy support (recyclability rules, EPR, packaging directives) • Cost-parity & performance improvement • Single-polymer & coating-technology gains	• Cost premium vs multi-material incumbents • Recycling-infrastructure & collection gaps • Barrier, shelf-life & performance trade-offs • Resin, supply-chain & price volatility • Standards, labelling & greenwashing-claim scrutiny

SEGMENTATION SNAPSHOT

By Material Type	Mono-PE · mono-PP · mono-PET · paper-based mono · coated mono-material
By Structure	Single-polymer · paper-based · coated recyclable
By Application	Food & beverage · personal & home care · pet food & industrial
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 mono-material flexible packaging 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:

Berry Global Group, Inc. · ProAmpac LLC · Sealed Air Corporation · Constantia Flexibles Group GmbH · Transcontinental 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 mono-material flexible packaging 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.