

ANMD-MRS33-328 · Sustainable Packaging Innovations

Paper-Based Barrier Alternatives to Plastic

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

Paper-based barrier alternatives replace plastic-laminated and multilayer packaging with recyclable barrier-coated, dispersion-coated and laminate papers that deliver grease, moisture and oxygen protection while staying repulpable. Base paper, dispersion coatings, bio-coatings, barrier additives and sealants combine into recyclable barrier packaging for food, flexibles and foodservice. The pay-off is measurable: plastic-laminate elimination, recyclability in paper streams and retained barrier performance. This report is a comprehensive, decision-grade study of that market across barrier type, structure, component, application, end-user, business and deployment model.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

The sustainability case is the report's backbone. Beyond plastic substitution, paper barriers deliver measurable plastic-laminate elimination, paper-stream recyclability and carbon savings, while mono-material design strengthens the circularity story.

Mapped Sustainable Development Goals:

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

Measurable sustainability outcomes assessed:

- Recyclable, repulpable mono-material barrier packaging
- Plastic-laminate and multilayer elimination
- Grease, moisture and oxygen protection retained
- Coating chemistry and recyclability 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. Near-term value concentrates in Europe (Germany, United Kingdom, France, Nordics); Asia Pacific (China, Japan, India, Southeast Asia); North America (United States, Canada), while Latin America, Africa and the Middle East are assessed on their own merits rather than aggregated into Rest of World.

MARKET OVERVIEW

Paper-based barriers are scaling as brands replace plastic laminates with recyclable paper.

Paper-based barriers are scaling as brands replace plastic laminates with recyclable paper. Demand is driven by the convergence of plastic-laminate regulation with recyclability mandates and brand commitments, supported by maturing barrier-coating technology across Europe, North America and Asia Pacific. The market is read three ways — value, tonnes produced and packaging volume — and forecast under conservative, base, accelerated and disruption scenarios, with every projection resolved to the 2025 base year and each region reported separately rather than folded into Rest of World.

- Europe leads recyclability-driven adoption, anchored by Germany, the United Kingdom, France and the Nordics, where plastic-laminate rules and recyclability targets drive barrier-paper demand.
- Asia Pacific is the scale engine, with China, Japan, India and Southeast Asia combining large flexible-packaging volumes with growing barrier-paper capacity.
- North America is accelerating, supported by brand plastic-reduction pledges and recyclable barrier-paper demand across the United States and Canada.
- Barrier type and application segment the value, across barrier-coated, dispersion-coated and recyclable-laminate papers, and food-packaging, flexible-packaging and foodservice use cases, each with distinct economics.

REGIONAL OUTLOOK

Across the seven reporting regions, the report separates recyclability-driven leaders from high-growth and emerging markets, profiling named country sub-markets, policy regimes and project pipelines in each. Europe and Asia Pacific anchor near-term volume; North America scales on brand pledges; while Latin America, Africa and the Middle East are assessed on their own merits — for substitution, foodservice and circularity — rather than aggregated away.

| Region | Stage | Lead Markets & Drivers |
|---------------|----------------------|--|
| Europe | Recyclability leader | Germany, United Kingdom, France, Nordics — plastic-laminate rules, recyclability targets |
| Asia Pacific | Scale engine | China, Japan, India, Southeast Asia — flexible-packaging volume, barrier-paper capacity |
| North America | Accelerating | United States, Canada — brand plastic-reduction pledges, recyclable barriers |
| Latin America | Emerging | Brazil, Mexico — foodservice and flexible substitution |
| Africa | Frontier | South Africa, Egypt — paper-packaging growth, local production |
| Middle East | Frontier | UAE, Saudi Arabia — foodservice packaging, recyclability investment |

KEY MARKET DRIVERS & RESTRAINTS

| Drivers | Restraints |
|---|---|
| <ul style="list-style-type: none"> • Plastic-laminate regulation & recyclability mandates • Brand plastic-reduction & mono-material goals • Barrier-coating & bio-coating innovation • Paper-recycling-stream compatibility demand • Flexible-to-paper substitution growth | <ul style="list-style-type: none"> • Barrier-vs-recyclability performance trade-offs • Coating cost & processing complexity • Repulpability & de-inking constraints • Food-contact & migration compliance • Heat-seal & converting limitations |

SEGMENTATION SNAPSHOT

| | |
|----------------------------|--|
| By Barrier Type | Barrier-coated · dispersion-coated · recyclable laminates |
| By Structure | Single-coat · multi-coat · laminated (recyclable) |
| By Component | Base paper · dispersion coatings · bio-coatings · barrier additives · sealants |
| By Application | Food packaging · flexible packaging · foodservice |
| By End User | Brand owners · converters · foodservice · retailers |
| 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 — Paper-Based Barrier Alternatives to Plastic
- › Chapter 3. Executive Intelligence and Decision Dashboard
- › Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

Part II — Market Intelligence, Sizing, Forecasting and Segmentation

- › Chapter 5. Industry Overview and Market Evolution
- › Chapter 6. Market Dynamics
- › Chapter 7. Global Market Size and Forecast, 2020–2032
- › Chapter 8. Market Segmentation Analysis
- › Chapter 9. End-User and Demand-Side Intelligence
- › Chapter 10. Pricing, Cost and Commercial Model Intelligence

Part III — Regional and Country Intelligence

- › Chapter 11. Global Regional Intelligence Framework
- › Chapter 12. North America Market Intelligence
- › Chapter 13. Europe Market Intelligence
- › Chapter 14. Asia Pacific Market Intelligence
- › Chapter 15. Latin America Market Intelligence
- › Chapter 16. Africa Market Intelligence
- › Chapter 17. Middle East Market Intelligence
- › Chapter 18. Rest of World Market Intelligence

Part IV — Technology, Innovation and Category-Specific Intelligence

- › Chapter 19. Technology Landscape and Architecture
- › Chapter 20. Emerging and Next-Generation Technology Intelligence
- › Chapter 21. Category-Specific Intelligence Module
- › Chapter 22. Research, Innovation and Funding Landscape

Part V — Company, Competition, Patent and Project Intelligence

- › Chapter 23. Competitive Landscape
- › Chapter 24. Company Profiles
- › Chapter 25. Mergers, Acquisitions, Partnerships and Ecosystem Intelligence
- › Chapter 26. Patent Landscape and Intellectual Property Intelligence
- › Chapter 27. Project, Deployment and Case-Study Intelligence

Part VI — Sustainability, ESG, SDG, Climate and Natural-Capital Intelligence

- › Chapter 28. Sustainability Intelligence Suite
- › Chapter 29. ESG Intelligence and Double Materiality
- › Chapter 30. ESG and Sustainability Framework Alignment
- › Chapter 31. SDG Intelligence
- › Chapter 32. Carbon, Net-Zero and Climate-Mitigation Intelligence
- › Chapter 33. Water, Biodiversity and Natural-Capital Intelligence
- › Chapter 34. Circular Economy and Resource-Security Intelligence
- › Chapter 35. Social Impact, Human Capital and Community Intelligence
- › Chapter 36. Climate Risk, Adaptation and Resilience Intelligence

Part VII — Supply Chain, Policy, Legal, Economics and Finance

- › Chapter 37. Value Chain, Supply Chain and Geopolitical Intelligence
- › Chapter 38. Policy, Regulation and Incentive Intelligence
- › Chapter 39. Legal, Contracting and Risk-Allocation Intelligence
- › Chapter 40. Unit Economics, CAPEX, OPEX and Return Analysis
- › Chapter 41. Investment, Sustainable Finance and Bankability Intelligence

Part VIII — Scenario, Future Intelligence and Final Due Diligence Verdict

- › Chapter 42. Scenario Analysis and Future Intelligence
- › Chapter 43. Sustainability Due Diligence Framework and Data-Room Index
- › Chapter 44. Risk Register, RAG Rating and Anti-Greenwashing Screen
- › Chapter 45. Bottom-Line Verdict and Strategic Recommendations
- › Chapter 46. Implementation Roadmap and Stakeholder Playbooks

Part IX — Annexes, Directories and Reference Material

- › Chapter 47. Methodology Annex
- › Chapter 48. Corporate Directory and Company Intelligence Annex
- › Chapter 49. Patent Directory and Patent Intelligence Annex
- › 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 specialty-paper makers, coating specialists and packaging majors.

Representative players profiled in the full report:

Stora Enso Oyj · Mondi plc · UPM-Kymmene Oyj · Sappi Limited · Koehler Paper SE · and 25+ further profiled players across the value chain.

Investment intelligence: venture, infrastructure, growth, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and investment readiness verdict.

KEY QUESTIONS THIS REPORT ANSWERS

- ? How large is the global paper-based barrier alternatives to plastic market, and how fast will it grow to 2032?
- ? Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- ? How do the category economics change returns versus incumbent alternatives?
- ? 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 verdict in a single architecture.

- › Triangulated sizing — every market read three ways so value, volume and the report's physical unit 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, neutral investment-readiness verdict.

WHO SHOULD BUY THIS REPORT

Investors, manufacturers, developers, agribusiness, utilities, policymakers, lenders, strategic corporate planners and decision-makers.

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.