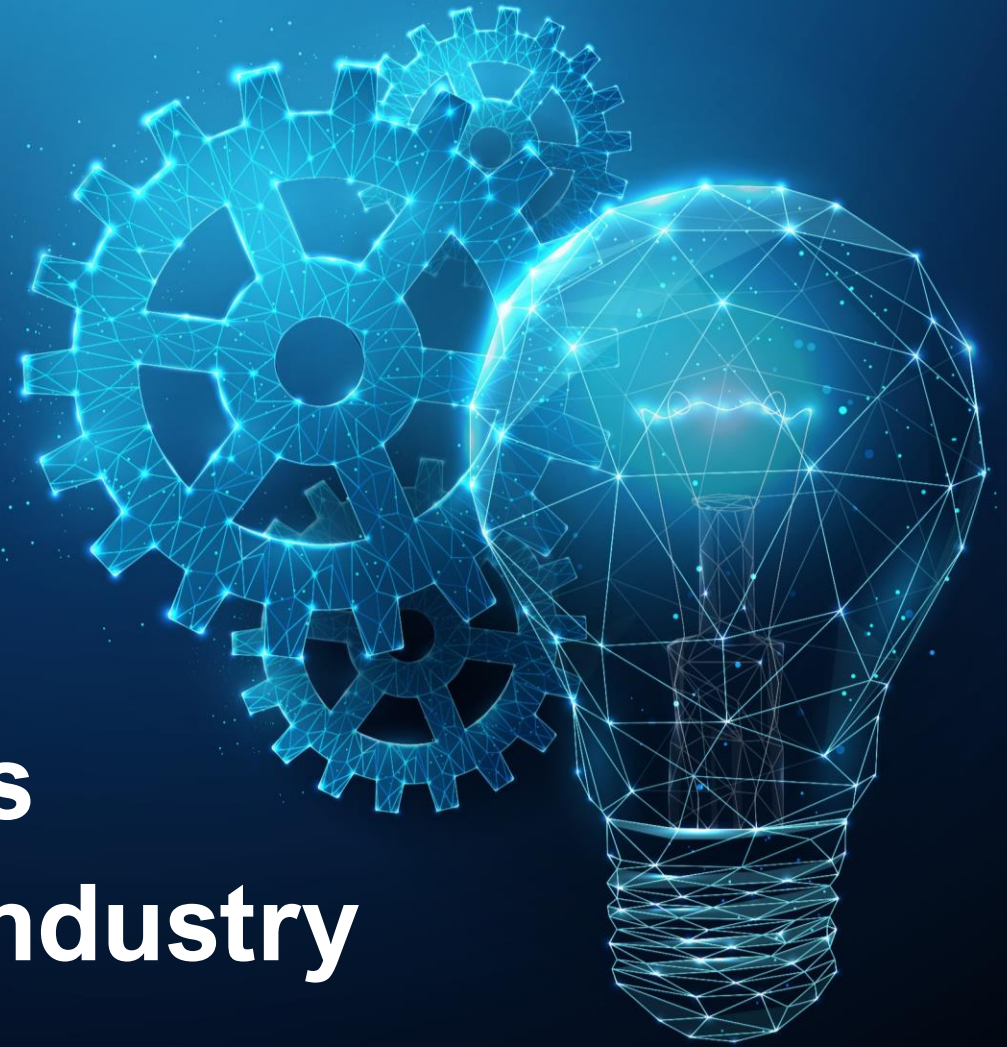
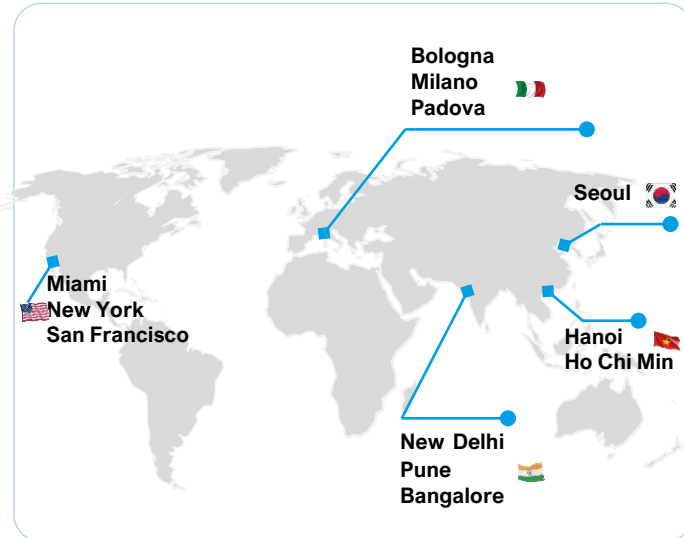


What's next?

Trends and Opportunities in the Italian Packaging Industry



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Market environment



Source: GlobalData

Content Curation: Knowledge Office Bonfiglioli Consulting






Market Environment – Key Takeaways

	Market overview	Key industries	Growth drivers
Rigid Plastics	<ul style="list-style-type: none"> Rigid plastics accounted for the largest volume share of 36.4% in 2021 in the Italian packaging market. The market for rigid plastics packaging material is forecast to register a CAGR of 2.3% during 2021–26, growing from 28.6 billion units in 2021 to 32 billion units in 2026. 	<ul style="list-style-type: none"> Rigid plastics packaging is largely consumed by the food industry, which accounted for 55.3% of the overall rigid plastics consumed in 2021, primarily driven by the dairy & soy food sector. Consumption of rigid plastics in the non-alcoholic beverages industry is projected to grow the fastest at a CAGR of 2.8% during 2021–26. 	<ul style="list-style-type: none"> Economical, durability, portability, and lightweight are the key characteristics boosting the usage of rigid plastics across sectors. While rigid plastics packages are mostly preferred due to low cost, they also offer ample convenience to consumers. However, rising consumer eco-consciousness is putting pressure on manufacturers to reduce plastic usage, which may have an impact on the material's growth.
Rigid Metal	<ul style="list-style-type: none"> Rigid metal accounted for a share of 7.6% of the Italian packaging market in 2021. The market for rigid metal packaging material is expected to register a CAGR of 1.5% during 2021–26, from 6 billion units in 2021 to 6.4 billion units in 2026. 	<ul style="list-style-type: none"> Rigid metal packaging is largely consumed by the food industry, which accounted for a share of 47.6% in 2021, primarily driven by the fruit and vegetables sector. Consumption of rigid metal in the non-alcoholic beverages industry is projected to grow the fastest at a CAGR of 3.2% during 2021–26. 	<ul style="list-style-type: none"> Usage of cans is increasing due to its packaging advantage of a strong build, convenience, and impermeable nature to gases and vapors. Its high recyclability, which makes it more sustainable, along with growing consumer preference towards smaller pack sizes to align with their needs of on-the-go consumption and portion control, is likely to contribute further to the growth of rigid metal pack material.
Paper & Board	<ul style="list-style-type: none"> Paper & board registered 13.8% market share in the Italian packaging market in 2021. The market for paper & board packaging material is expected to register a CAGR of 0.6% during 2021–26, from 10.8 billion units in 2021 to 11.1 billion units in 2026. 	<ul style="list-style-type: none"> Paper & board packaging is largely consumed by the food industry, which accounted for a share of 48.1% in 2021. Consumption of paper & board in the non-alcoholic beverages industry is projected to grow the fastest at a CAGR of 4.5% during 2021–26. 	<ul style="list-style-type: none"> Growing environmental awareness and a rising urban population who are moving towards more sustainable packaging, are driving the usage of paper & board packaging. Apart from sustainability, light weight and convenient features of this packaging, long shelf life, and eco-friendliness, are key parameters that drive the growth of this packaging material.

Market Environment – Key Takeaways

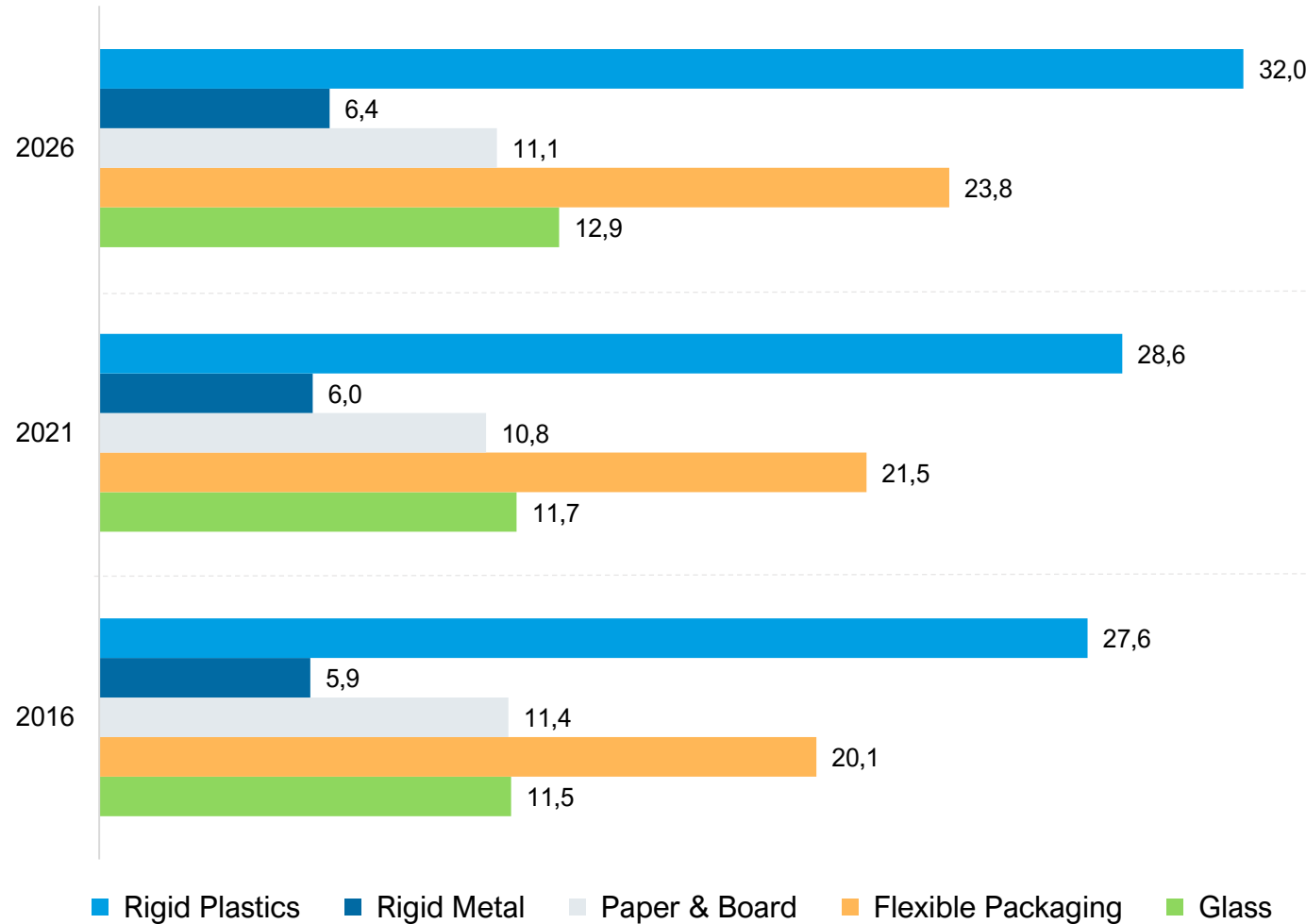
	Market overview	Key industries	Growth drivers
Flexible Packaging	<ul style="list-style-type: none"> Flexible packaging material had a volume share of 27.3% in 2021. This packaging material is anticipated to register a CAGR of 2.1% during 2021–26, from 21.5 billion units in 2021 to 23.8 billion units in 2026. 	<ul style="list-style-type: none"> Flexible packaging is mostly used in the food industry as it occupied 81.4% of the total demand in 2021. Within food, bakery and cereals and dairy & soy food extensively used this packaging material. Consumption of flexible pack material in the food industry is projected to grow the fastest at a CAGR of 2.3% during 2021–26. 	<ul style="list-style-type: none"> Growth is driven by its low cost and flexibility which makes it suitable for multiple shapes and sizes as well as easy closures (zip-locks). The emergence of new sustainable and efficient flexible plastics, such as recycled plastics, are also expected to gain traction in the future.
Glass	<ul style="list-style-type: none"> Glass packaging market accounted for a volume share of 14.9% in 2021. This packaging material is projected to register a CAGR of 2.0% during 2021–26, from 11.7 billion units in 2021 to 12.9 billion units in 2026. 	<ul style="list-style-type: none"> Glass packaging is largely consumed by the alcoholic beverages industry, which accounted for 47.4% of the overall glass pack material consumed in 2021. Consumption of glass pack material in non-alcoholic beverages is projected to grow the fastest at a CAGR of 2.9% during 2021–26. 	<ul style="list-style-type: none"> The ability to add colors, shapes, and unique designs to glass packaging enhances its visual appeal and premium positioning. Glass is known to preserve products for longer durations, being virtually inert and impermeable to chemicals and light. This makes it an ideal choice for packaging in many industries.

Pack Material Market – Overview

	Rigid plastics	Flexible packaging	Rigid metal	Glass	Paper & board
					
No. of Units (Mn), 2021	28,612.4	5,971.2	10,818.9	21,458.0	11,673.1
Market Share 2021	36.4%	7.6%	13.8%	27.3%	14.9%
CAGR 2016–2021	0.7%	0.2%	-1.1%	1.4%	0.3%
CAGR 2021–2026	2.3%	1.5%	0.6%	2.1%	2.0%
Key Driving Industries	<ul style="list-style-type: none"> • Food • Non-alcoholic beverages 	<ul style="list-style-type: none"> • Food • Non-alcoholic beverages 	<ul style="list-style-type: none"> • Food • Tobacco and Tobacco Products 	<ul style="list-style-type: none"> • Food • Pet Care 	<ul style="list-style-type: none"> • Alcoholic beverages • Food
Key Drivers	<ul style="list-style-type: none"> • Convenient • Cost-effective • Ease of Manufacturing 	<ul style="list-style-type: none"> • Durable • Reusable • Moisture/heat resistant 	<ul style="list-style-type: none"> • Eco-friendly • Sustainable • Light weight 	<ul style="list-style-type: none"> • Easy storage • Resealable • Light weight 	<ul style="list-style-type: none"> • Recyclable • Premium • Heat resistant

Pack Materials Market Size and Growth Analysis

Pack material market size (in billion pack units), 2016 – 26



The packaging industry in Italy is set to witness growth from 78.5 billion units in 2021 to 86.2 billion units in 2026, registering a CAGR of 1.9%.

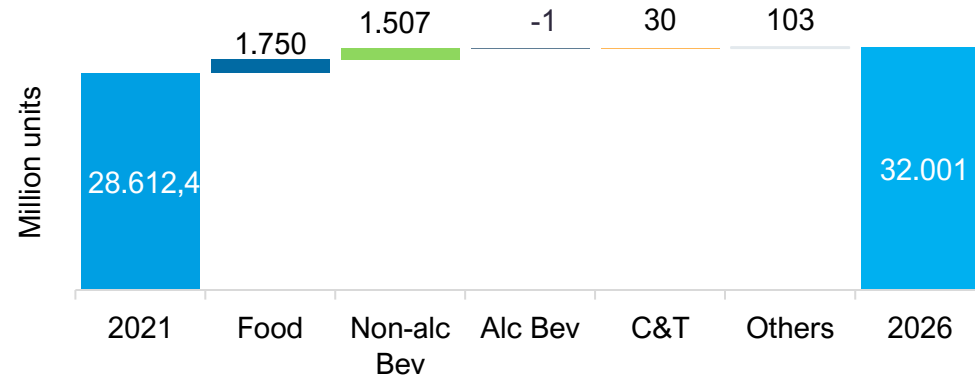
In 2021, rigid plastics, which garnered the maximum share of 36.4%, will continue to dominate through 2026. This was followed by flexible packaging and glass with shares of 27.3% and 14.9%, respectively. Rigid plastic's low cost and light weight contribute to its significant usage in packaging. The packaging material offers easy and convenient storage.

Rigid plastics is anticipated to record the fastest CAGR of 2.3%, during 2021–26, as convenience continues to remain important to consumers.

Pack Material Growth Contribution by Industry (1/2)

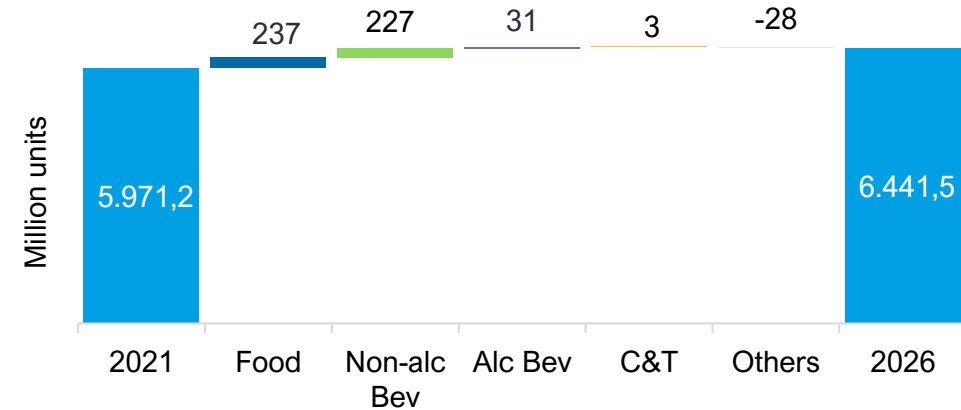
Industry contribution to the growth of Rigid Plastics, 2021 – 2026

Food: 51.6%



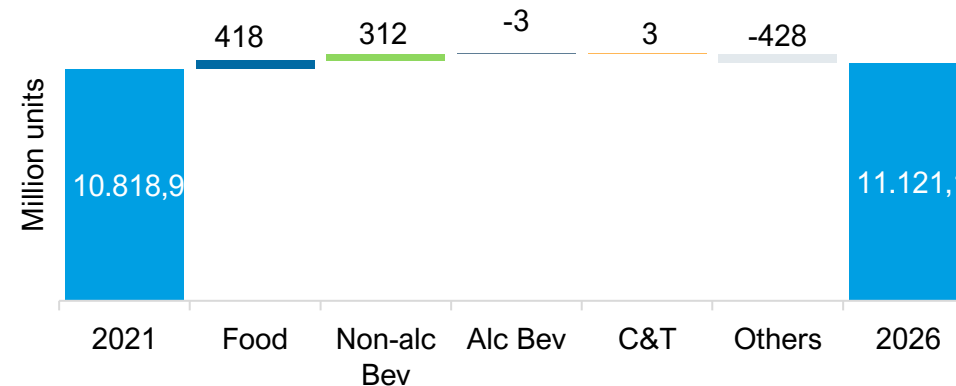
Industry contribution to the growth of Rigid Metal, 2021 – 2026

Food: 50.4%



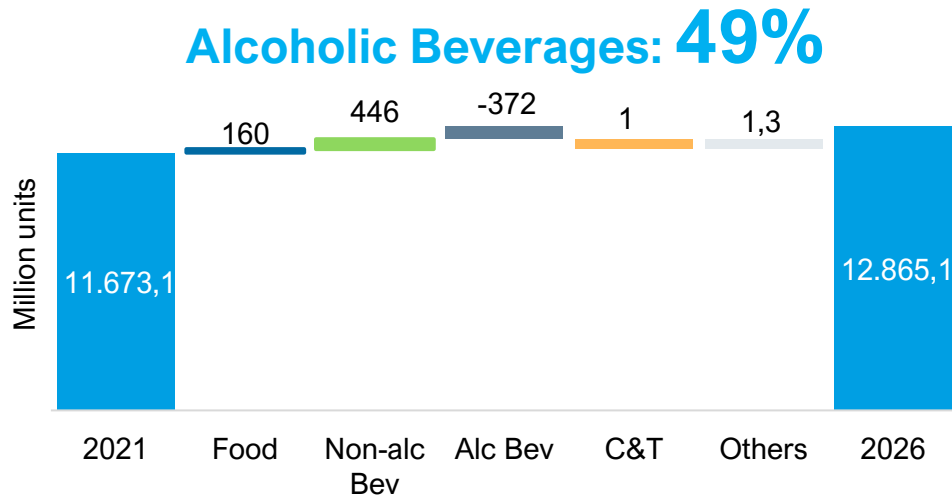
Industry contribution to the growth of Paper & Board, 2021 – 26

Food: 138.5%

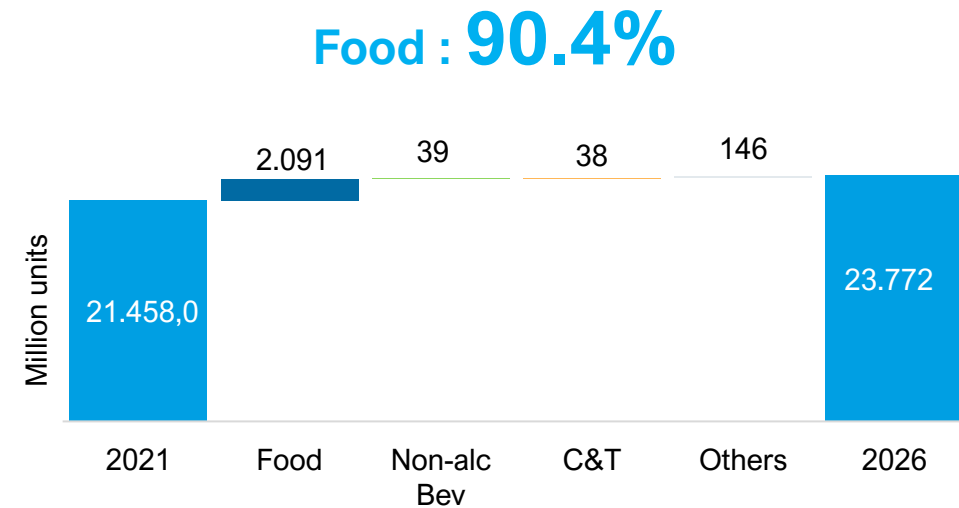


Pack Material Growth Contribution by Industry (2/2)

Industry contribution to the growth of Glass, 2021 – 2026



Industry contribution to the growth of Flexible Packaging, 2021– 2026



Market Size by Pack Material and Industry

The packaging industry in Italy is characterized by its strong usage in the food industry, accounting for a 57% share in terms of size, in 2021. In the food industry, flexible packaging was the most widely used pack material, accounting for 17.5 billion units in 2021, followed by rigid plastics, with 15.8 billion units. The demand for flexible packaging in food products is mostly attributed to its high consumption in bakery and cereals, dairy & soy food, and pasta & noodles, wherein consumers prefer products that provide the benefits of safe delivery and ease of transportation. Non-alcoholic beverages was the second-largest industry in 2021, with a share of 20%. In the non-alcoholic beverages industry, rigid plastics packaging accounted for 10.2 billion units in 2021, followed by glass with 2.9 billion units.

Industry		Use of pack material (in billion pack units) by industries, 2021					
		Rigid Plastics	Rigid Metal	Paper & Board	Flexible Packaging	Glass	Total
Food	Size (bn units)	15.8	2.8	5.2	17.5	3.2	44.5
Non - Alcoholic Beverages	Size (bn units)	10.2	1.3	1.3	0.3	2.9	16.0
Alcoholic Beverages	Size (bn units)	0.04	0.6	0.7	-	5.5	6.9
Cosmetics & Toiletries	Size (bn units)	0.9	0.1	0.1	0.8	0.1	2.0
Others*	Size (bn units)	1.6	1.1	3.6	2.9	0.01	9.2

Growth Analysis of Pack Material by Industry and Sector

Source: GlobalData

Content Curation: Knowledge Office Bonfiglioli Consulting



Pack Material by Industry – Key Takeaways

	Food	Non-Alcoholic Beverages	Alcoholic Beverages	Others
Rigid Plastics	<ul style="list-style-type: none"> Rigid plastics used in the food industry accounted for a share of 35.5% in 2021 and is expected to increase and reach 35.7% in 2026. Within the food industry, dairy & soy food occupied the largest share of 50.3% in 2021. 	<ul style="list-style-type: none"> Rigid plastics used in non-alcoholic beverages recorded a share of 63.7% in 2021 and is expected to decline and reach 63.1% in 2026. Within non-alcoholic beverages, soft drinks occupied more than 98.9% share in 2021. 	<ul style="list-style-type: none"> Rigid plastics in the alcoholic beverages industry accounted for a minor share of 0.6% in 2021. Within alcoholic beverages, rigid plastics was mostly used in the beer & cider sector. 	<ul style="list-style-type: none"> Rigid plastics usage in other industries recorded a share of 17.4% in 2021 and is expected to reach 18.9% in 2026. Within other industries, household care products occupied significant shares in 2021.
Rigid Metal	<ul style="list-style-type: none"> Rigid metal used in the food industry, recorded a share of 6.4% in 2021 and is expected to decline to 6.3% in 2026. Within the food industry, fruit and vegetables occupied the highest share in 2021. 	<ul style="list-style-type: none"> The share of rigid metal used in the non-alcoholic beverages industry stood at 8.2% in 2021 and is expected to reach 8.3% in 2026. Within non-alcoholic beverages, soft drinks occupied 85.8% share in 2021. 	<ul style="list-style-type: none"> Rigid metal accounted for a share of 9.2% in 2021 and is expected to decline and reach 8.9% in 2026. Beer & cider accounted for 98.4% share within the alcoholic beverages industry. 	<ul style="list-style-type: none"> Rigid metal used in the other industries recorded a share of 11.9% in 2021 and is expected to remain unchanged in 2026. Within other industries, paints & stains occupied significant shares in 2021.
Paper & Board	<ul style="list-style-type: none"> Paper & board used in the food industry, recorded a share of 11.7% in 2021 and is projected to decline to 11.4% in 2026. Within the food industry, dairy & soy food occupied the highest share in 2021. 	<ul style="list-style-type: none"> Non-alcoholic beverages industry accounted for a share of 7.9% in 2021 and is expected to reach 8.5% in 2026. Within the non-alcoholic beverages industry, soft drinks occupied a share of 84.2% in 2021. 	<ul style="list-style-type: none"> Paper & board packaging accounted for a share of 9.5% in 2021 and is expected to decline and reach 8.7% in 2026. Within the alcoholic beverages industry, wine captured the entire market share in 2021. 	<ul style="list-style-type: none"> The share of paper & board packaging in the other industries recorded a share of 39.2% in 2021 and is expected to decline and reach 35.4% in 2026. Within other industries, tobacco and tobacco products occupied a share of 86.8% in 2021.

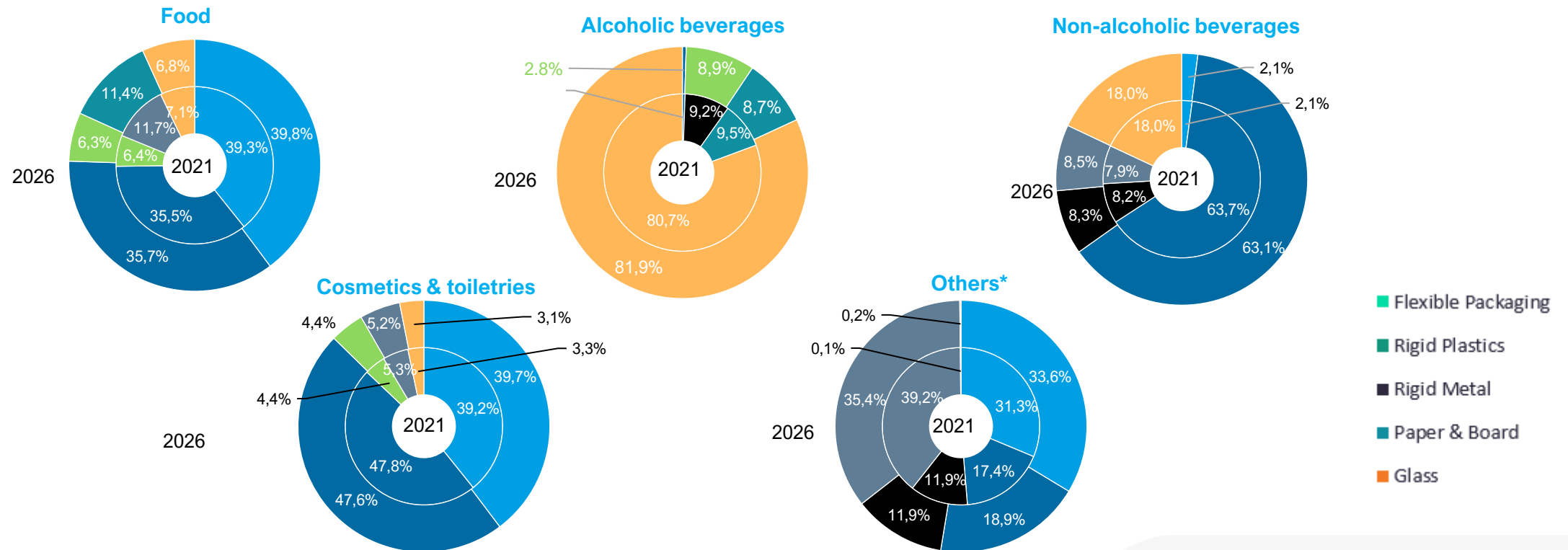
Pack Material by Industry – Key Takeaways

	Food	Non-Alcoholic Beverages	Alcoholic Beverages	Others
Flexible Packaging	<ul style="list-style-type: none"> Flexible packaging used in the food industry accounted for a share of 39.3% in 2021 and is expected to reach 39.8% in 2026. Within the food industry, bakery and cereals occupied a share of 36.2% in 2021. 	<ul style="list-style-type: none"> The share of flexible packaging used in the non-alcoholic beverage industry, stood at 2.1% in 2021 and is expected to remain unchanged in 2026. Within non-alcoholic beverages, hot drinks occupied a share of 84.4% in 2021. 	<ul style="list-style-type: none"> Flexible packaging was not used in the alcoholic beverages industry. 	<ul style="list-style-type: none"> Flexible packaging's share in the other industries accounted for 31.3% in 2021 and is expected to reach 33.6% in 2026. Within other industries, pet care products occupied a significant share in 2021.
Glass	<ul style="list-style-type: none"> Glass packaging used in the food industry accounted for a share of 7.1% in 2021 and is expected to decline and reach 6.8% in 2026. Within the food industry, seasonings, dressings & sauces occupied the largest share in 2021. 	<ul style="list-style-type: none"> Glass packaging's share in the non-alcoholic beverages industry stood at 18% in 2021 and is expected to reach unchanged in 2026. Within the non-alcoholic beverages industry, soft drinks occupied a share of 97.1% in 2021. 	<ul style="list-style-type: none"> The share of glass packaging used in the alcoholic beverages industry stood at 80.7% in 2021 and is expected to reach 81.9% in 2026. Within alcoholic beverages, beer & cider occupied a share of 54.5% in 2021. 	<ul style="list-style-type: none"> Glass packaging accounted for a minor share (0.1%) in other industries in 2021.

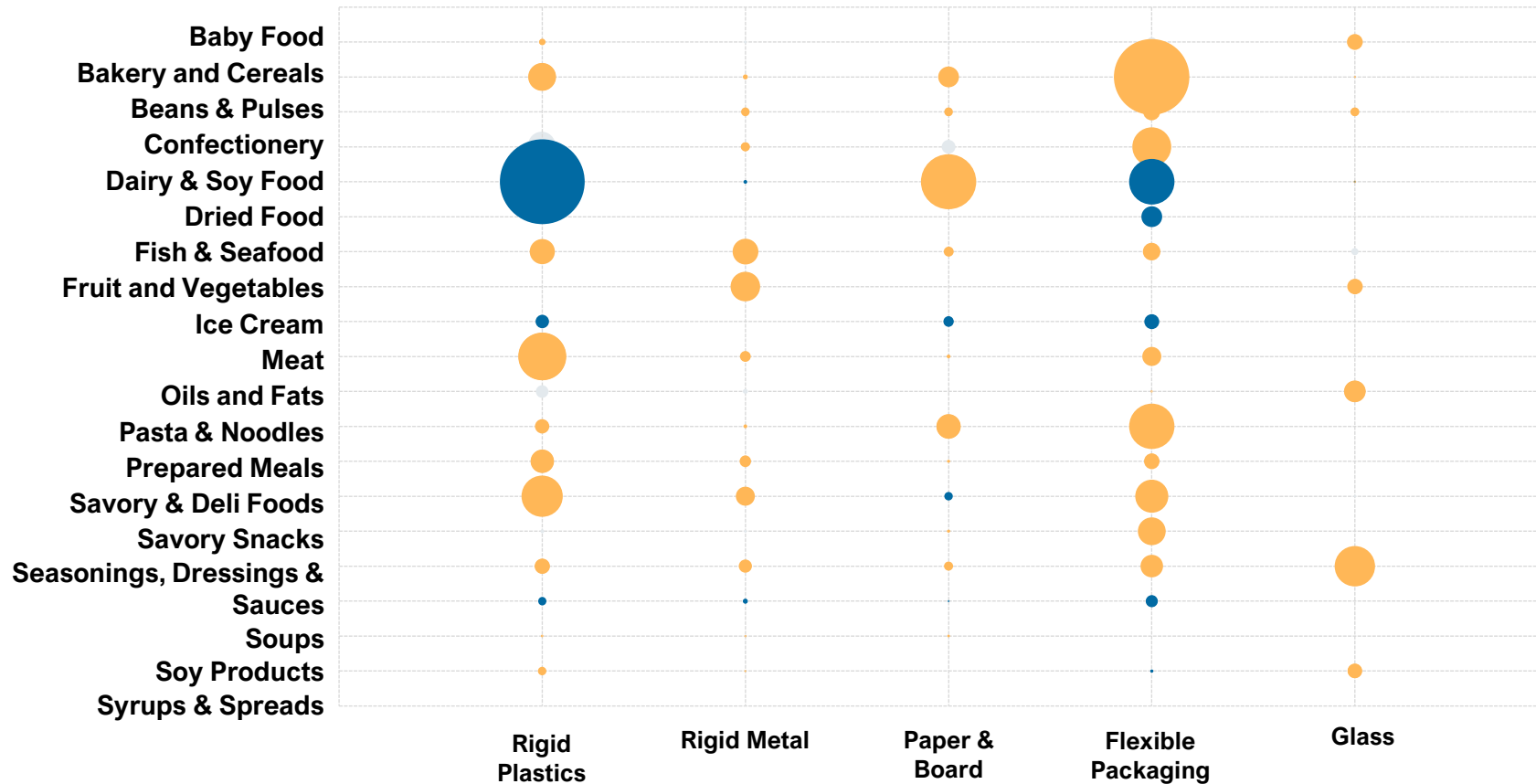
Packaging Share Change by Material and Industry

The charts below illustrate the change in volume share from 2021 to 2026 (forecast period) for each packaging material across industries. The use of flexible packaging in food industry is forecast to grow to 39.8% in 2026 from 39.3% in 2021.

In the alcoholic beverages industry, glass will register a share gain from 80.7% in 2021 to 81.9% in 2026, primarily due to the high demand for beer and cider products. Meanwhile, in the non-alcoholic beverages industry paper & board and rigid metal will note share gains during 2021–26



Growth Analysis by Industry – Food



Flexible packaging was the most consumed packaging material in the food industry, accounting for a 39.3% share in 2021. Bakery and cereals was the largest contributor with a 36.2% volume share, while the dairy & soy food sector will witness the fastest growth in flexible packaging at a CAGR of 10.1% during 2021–26. In the food industry, flexible packaging is also forecast to register the highest growth at a CAGR of 2.3% during 2021–26.

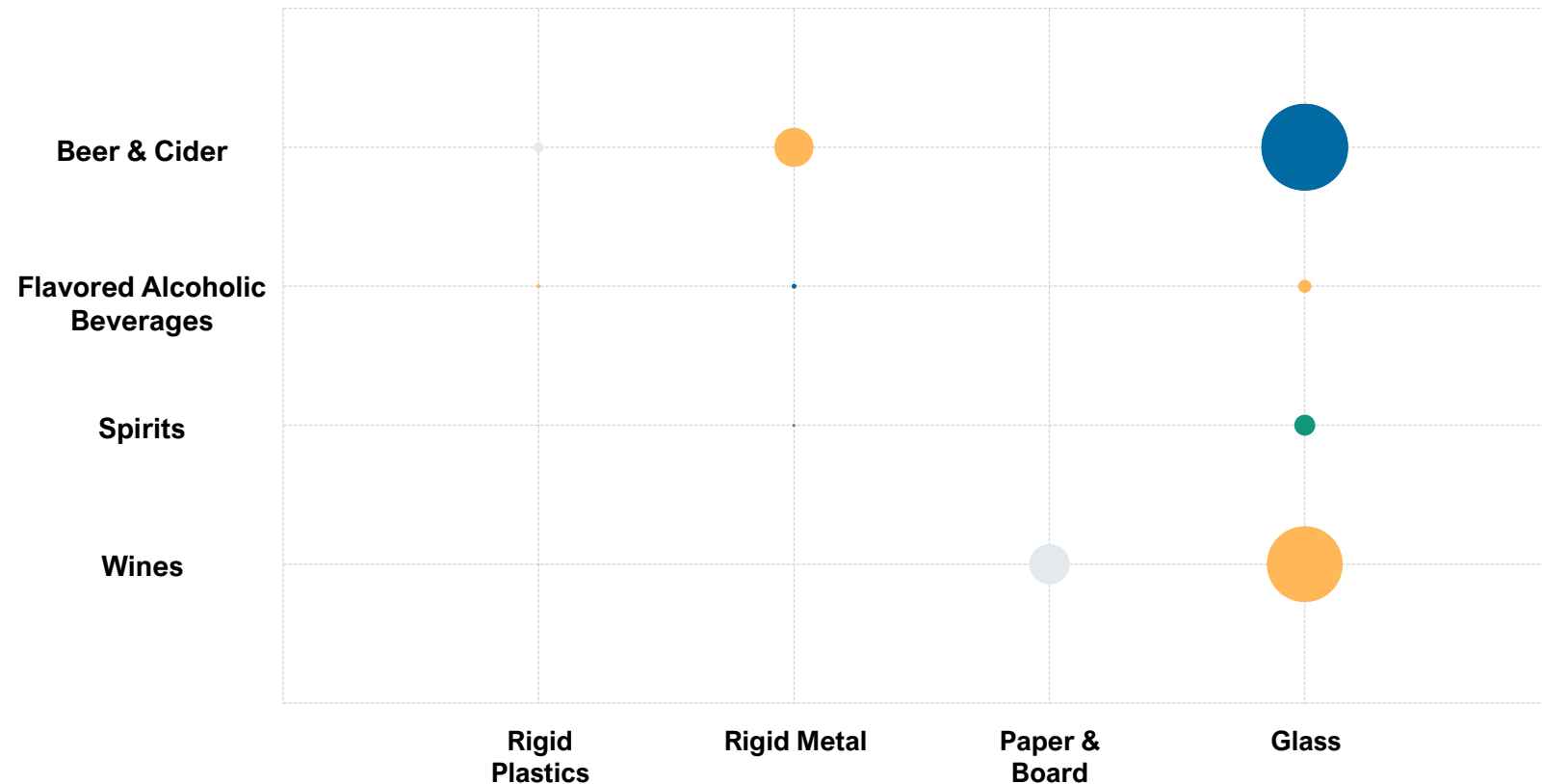
Size of Circle represents volume in 2021 in Million Units

Low five-year CAGR, 2021–26



High five-year CAGR, 2021–26

Growth Analysis by Industry – Alcoholic Beverages



Glass was the most consumed pack material in the alcoholic beverages industry, accounting for 80.7% share in 2021. Beer & cider was the largest contributor with 54.5% volume share, while the spirits sector will witness the fastest growth in glass pack material at a CAGR of 3.1% during 2021–26.

In the alcoholic beverages industry, glass pack material is expected to grow at the fastest CAGR of 2.0% during 2021–26.

Size of Circle represents volume in 2021 in Million Units

Low five-year CAGR, 2021–26

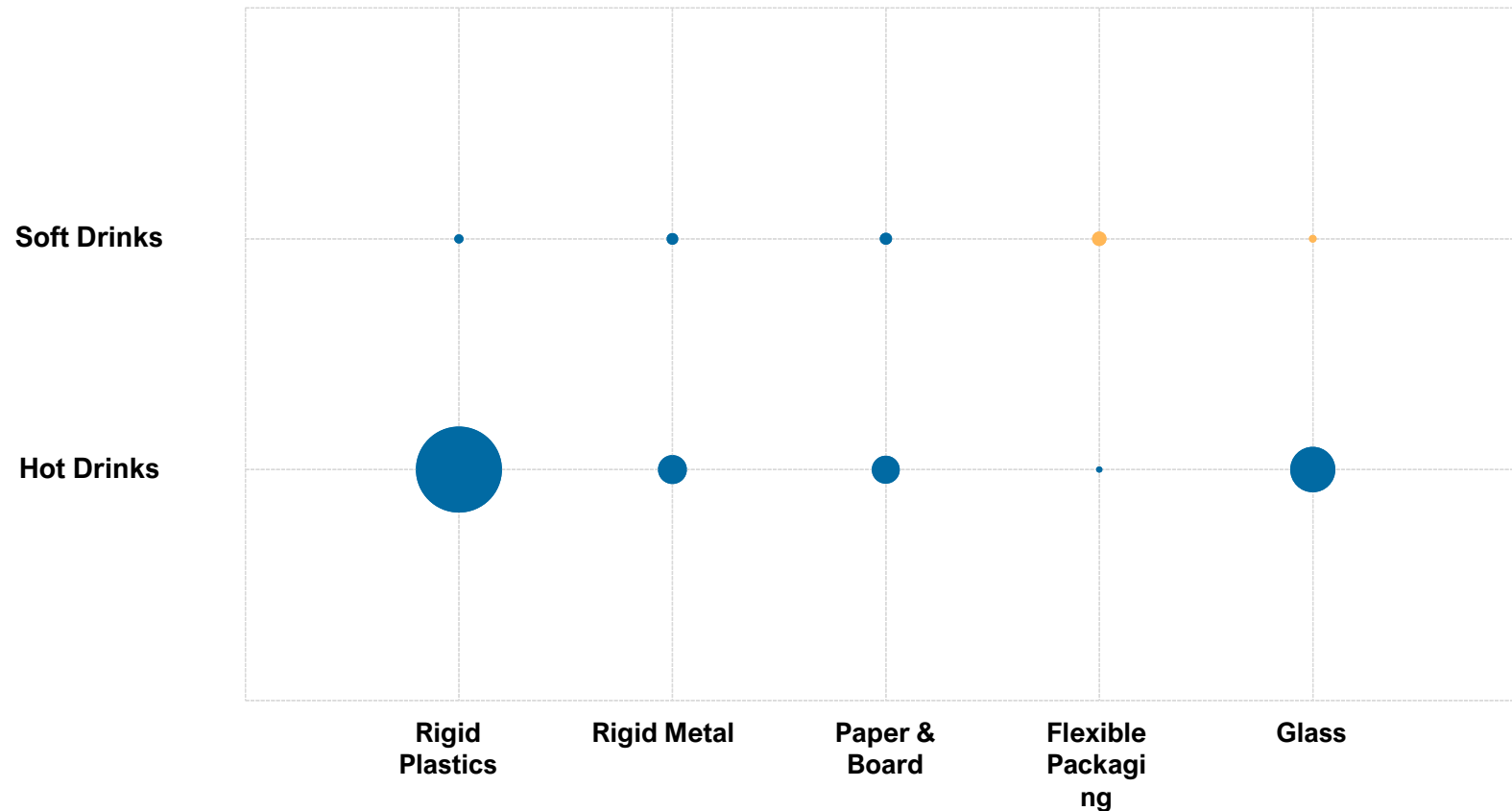
<0%

0–2%

>2%

High five-year CAGR, 2021–26

Growth Analysis by Industry – Non-Alcoholic Beverages



Rigid plastics was the most consumed pack material in the non-alcoholic beverages industry, accounting for a 63.7% share in 2021. Soft drinks was the largest contributor with 98.9% volume share, and the sector is also projected to record growth in rigid plastics at a CAGR of 2.8% during 2021–26.

In the non-alcoholic beverages industry, paper & board is expected to register the fastest CAGR of 4.5% during 2021–26.

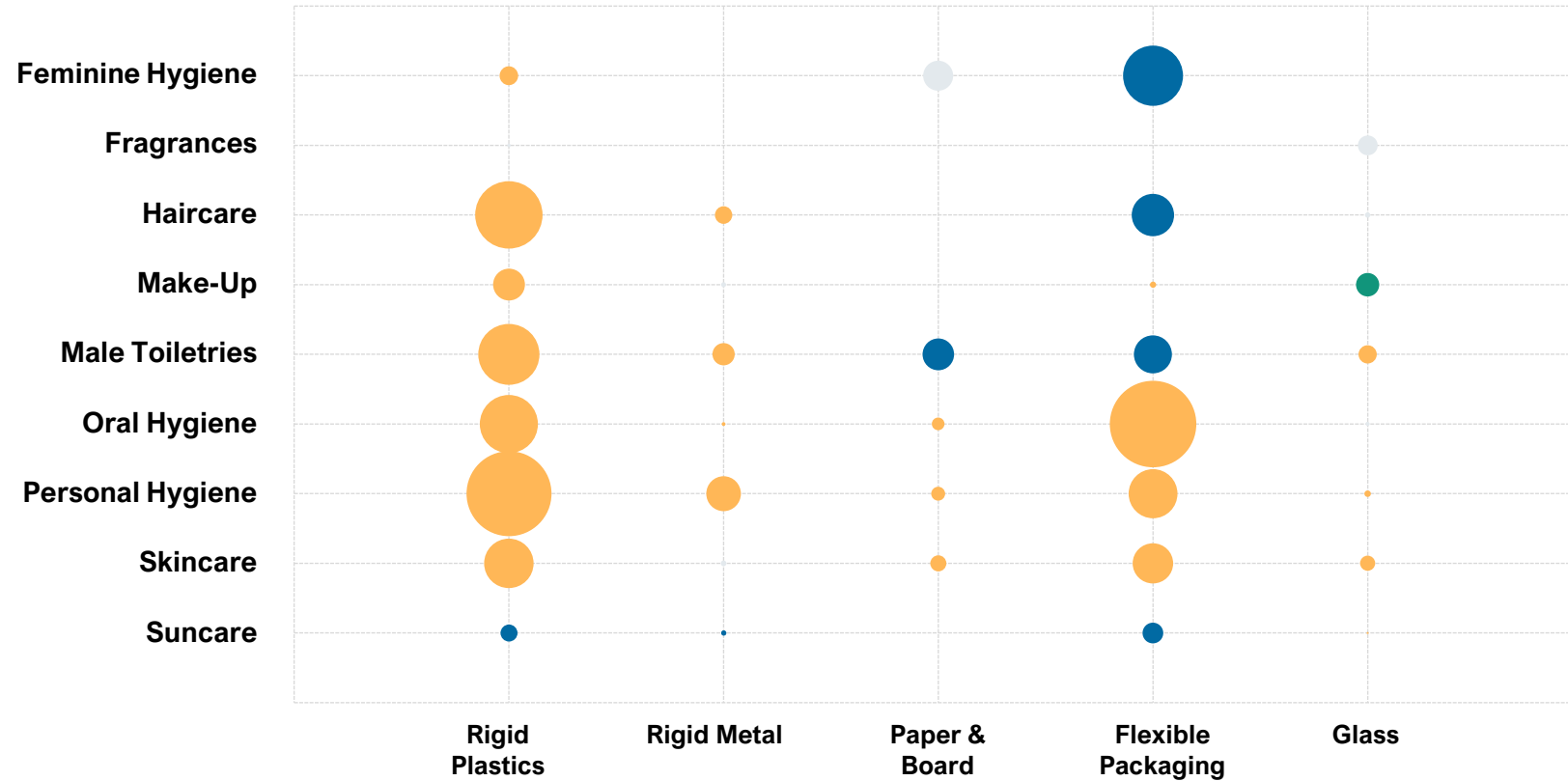
Size of Circle represents volume in 2021 in Million Units

Low five-year CAGR, 2021–26



High five-year CAGR, 2021–26

Growth Analysis by Industry – Cosmetics & Toiletries

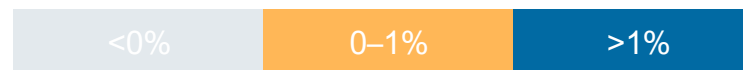


Rigid plastics was the most consumed pack material in the cosmetics & toiletries industry, accounting for 47.8% share in 2021. Personal hygiene and haircare were the largest contributors with 31.4% and 19.8% volume shares, respectively, while the suncare sector is projected to record the fastest growth in rigid plastics usage at a CAGR of 1.7% during 2021–26.

In the cosmetics & toiletries industry, flexible packaging pack material is expected to record the fastest growth at a CAGR of 1.0% during 2021–26.

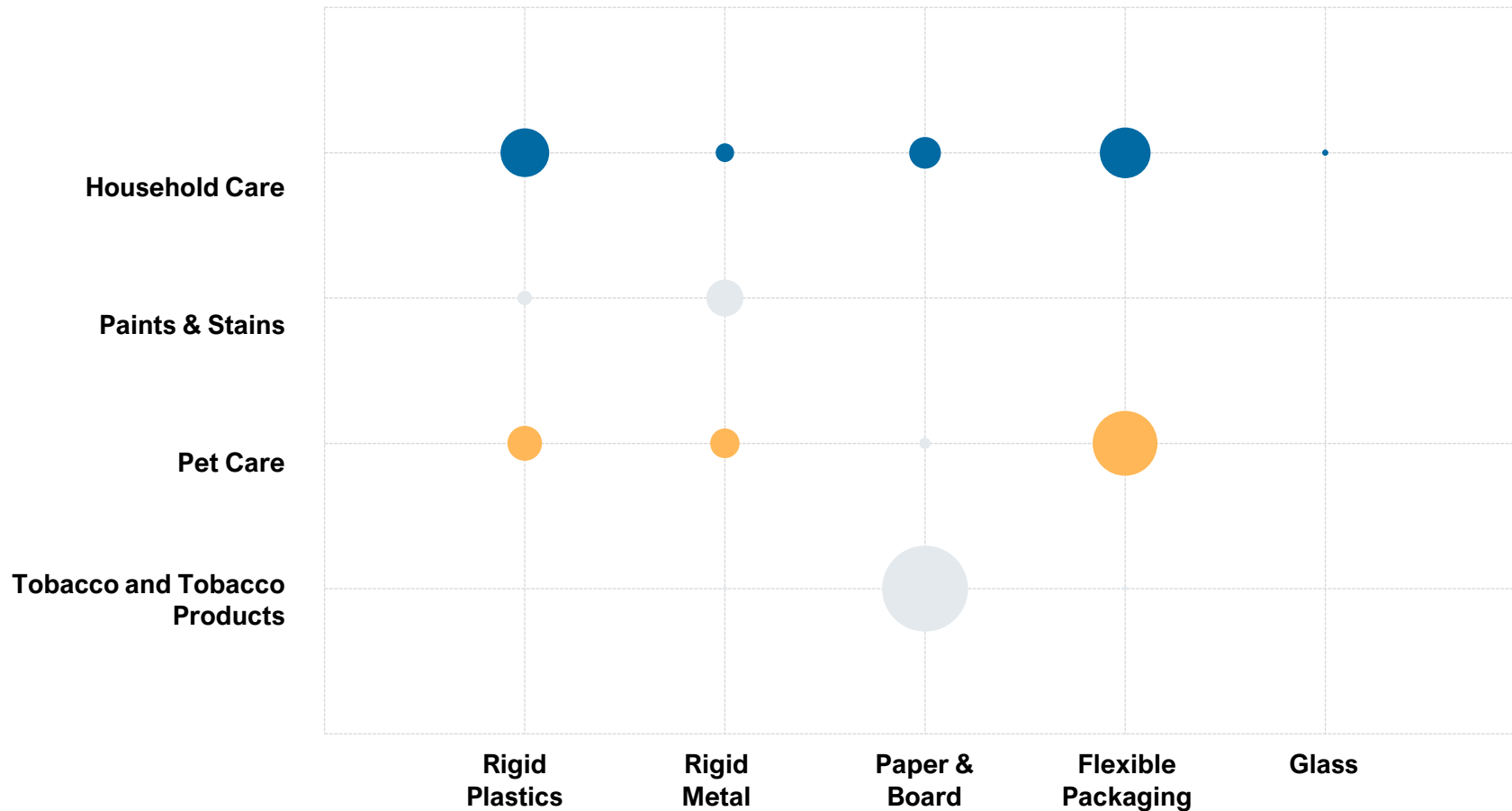
Size of Circle represents volume in 2021 in Million Units

Low five-year CAGR, 2021–26



High five-year CAGR, 2021–26

Growth Analysis by Industry – Other



Paper & board was the most consumed pack material within other industries, with its majority use being in tobacco and tobacco products. Household care will record the fastest growth among paper & board usage at a CAGR of 2.2% during 2021–26.

Among other industries, glass pack material is expected to record the fastest growth at a CAGR of 2.0% during 2021–26.

Size of Circle represents volume in 2021
in Million Units

Low five-year CAGR,
2021–26

<0%

0–1%

>1%

High five-year CAGR,
2021–26

Analysis by Pack Material Rigid Plastics

Source: GlobalData

Content Curation: Knowledge Office Bonfiglioli Consulting

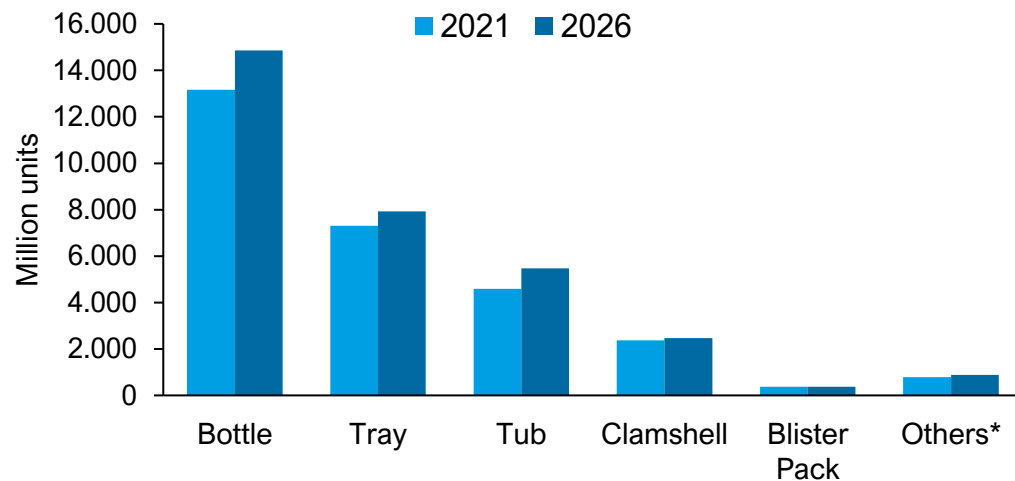


Rigid Plastics by Industries – Key Takeaways

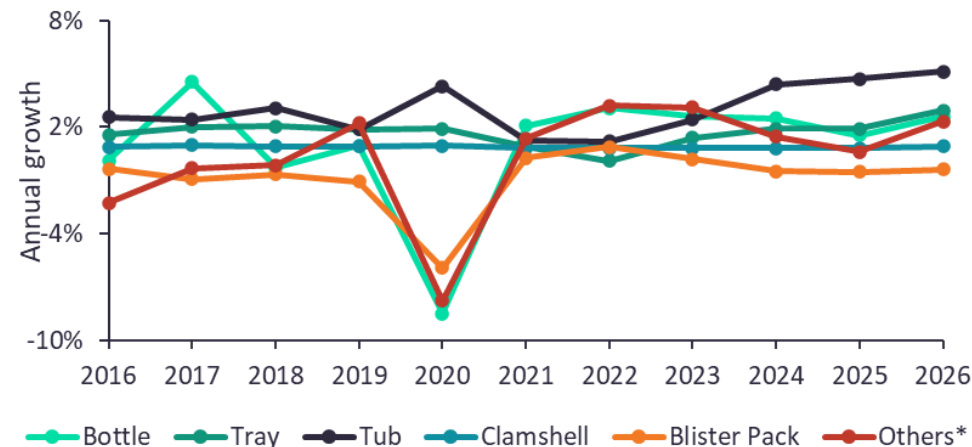
	Market overview	Key drivers	New product launches
Non-Alcoholic	<ul style="list-style-type: none"> Rigid plastics was most used in the food industry, accounting for a share of 55.3% in 2021. It is projected to reach 54.9% in 2026. Within food, the dairy & soy foods sector led in terms of rigid plastics usage in 2021. 	<ul style="list-style-type: none"> The growing preference for convenience and portability, continues to be major drivers of rigid plastics usage in food packaging. Rigid plastic packaging extends and protects the shelf life of food. 	<ul style="list-style-type: none"> Pastificio Rana Spa launched a new Giovanni Rana branded vegetable Ragout in a 225g microwaveable plastic bowl, making it extremely convenient for on-the-go consumption.
Food	<ul style="list-style-type: none"> Rigid plastics was also used significantly in the non-alcoholic beverages industry, accounting for a share of 35.7% in 2021. It is expected to decline and reach 36.6% in 2026. Soft drinks sector was the major consumer of rigid plastics in 2021. 	<ul style="list-style-type: none"> The increase in on-the-go consumption and the desire to consume in portions, drive the usage of PET bottles for their convenient storage options. However, non-biodegradable nature of this packaging will have a negative impact on its growth. 	<ul style="list-style-type: none"> Ferrero S.p.A. launched a tea infusion drink in a slender bottle-like pack with a cap closure. The cap closure provides effective control over dispensing, providing high functionality to consumers while on-the-go.
C&T	<ul style="list-style-type: none"> Rigid plastics' usage in the cosmetics & toiletries industry stood at 3.3% in 2021 and is expected to decline and reach 3.0% in 2026. Within cosmetics & toiletries, the personal hygiene sector occupied the largest share in 2021. 	<ul style="list-style-type: none"> The need for portability and convenience remain major drivers for rigid plastics' usage in cosmetics and toiletries. However, there is growing concern over rising landfills and oceans filled with discarded plastic packaging. 	<ul style="list-style-type: none"> Schwarzkopf & Henkel recently introduced a hair serum containing liquid keratin and pearl serum to aid in hair repair. The packaging has a rotatable hook-like top lid for easy opening.
Others	<ul style="list-style-type: none"> Rigid plastics' usage in other industries, recorded a share of 5.6% in 2021 and is expected to decline and reach 5.3% in 2026. Within other industries, general purpose cleaners occupied the largest share in 2021. 	<ul style="list-style-type: none"> Household care products largely used rigid plastics packaging in 2021. Convenience in terms of storage and usage of products is a major driver of rigid plastics packaging. 	<ul style="list-style-type: none"> The Lenor Fabric Softener was launched in a 1.4-liter bottle. The product is packaged in a rigid plastic bottle to prevent spills.

Rigid Plastics – Growth Analysis by Pack Type and Pack Sub-Type

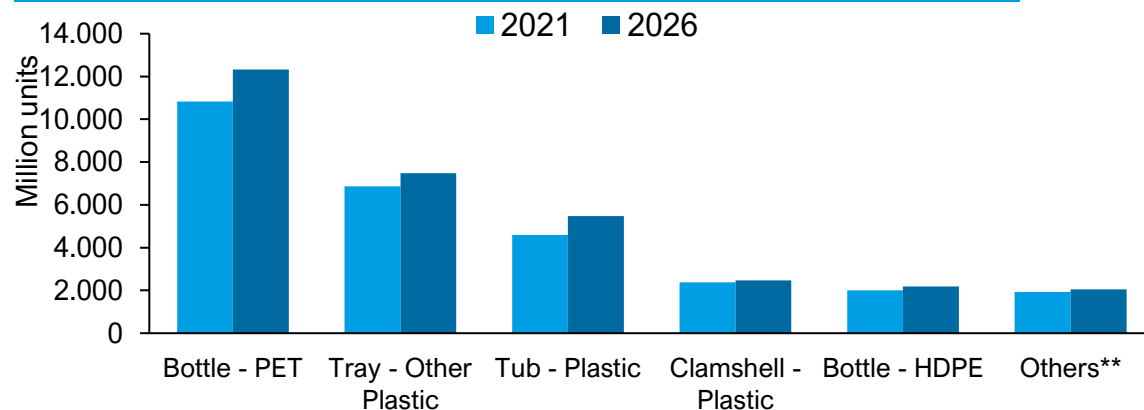
Pack Type



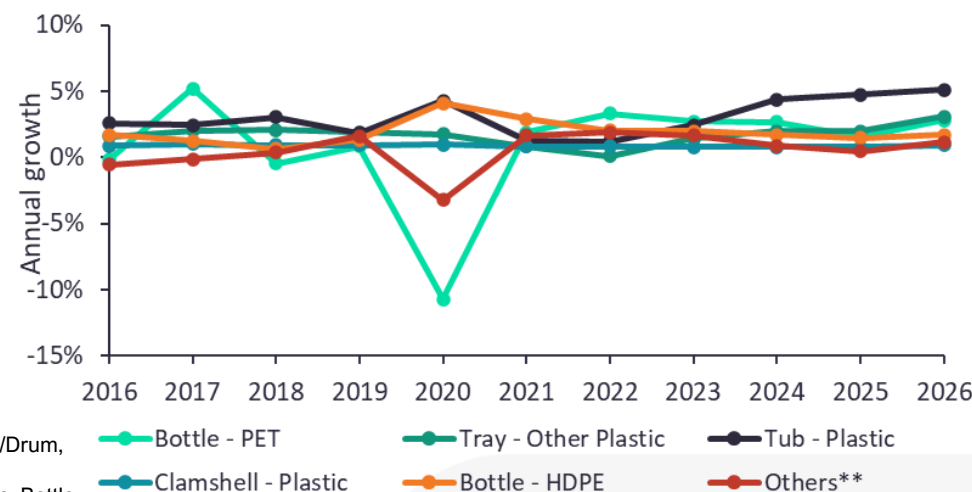
Annual growth rate by Pack Type, 2016 – 2026



Pack Sub-Type



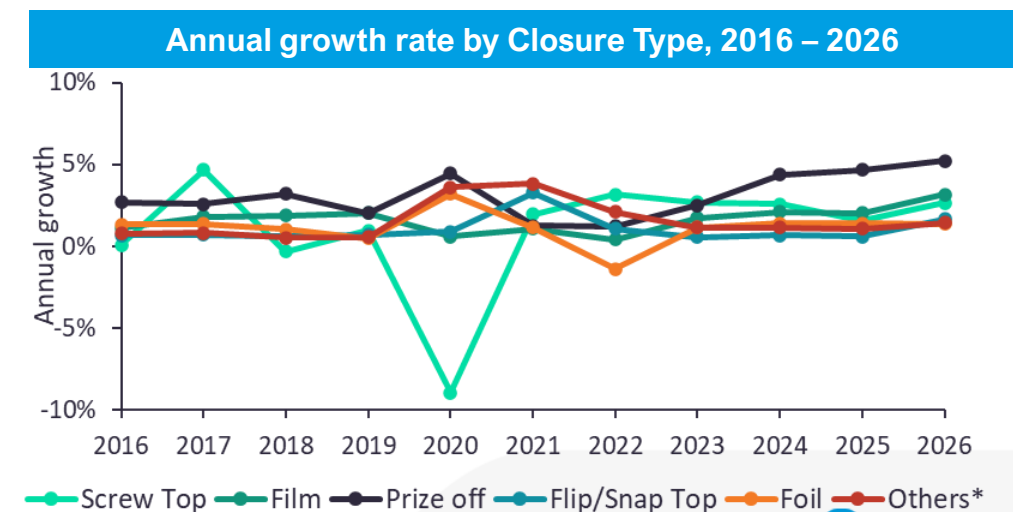
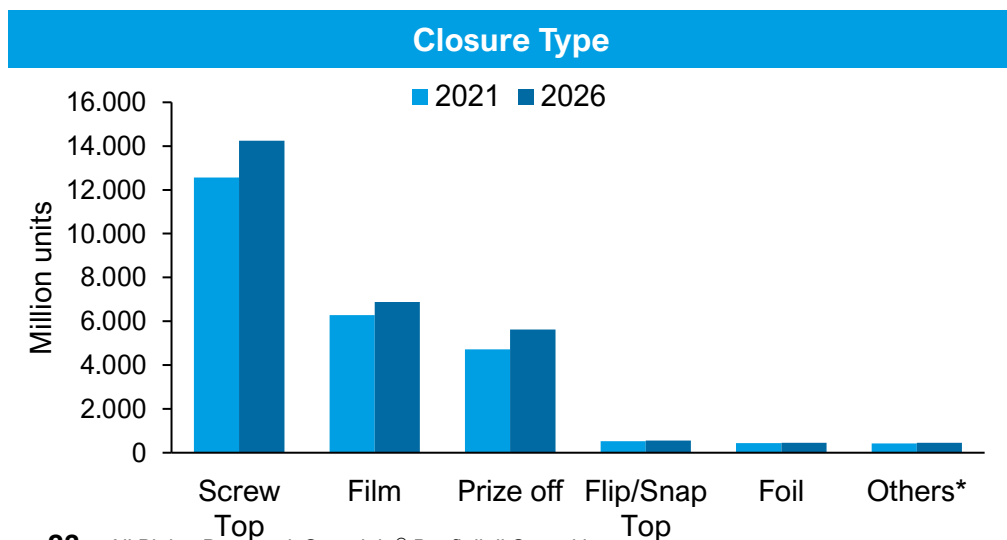
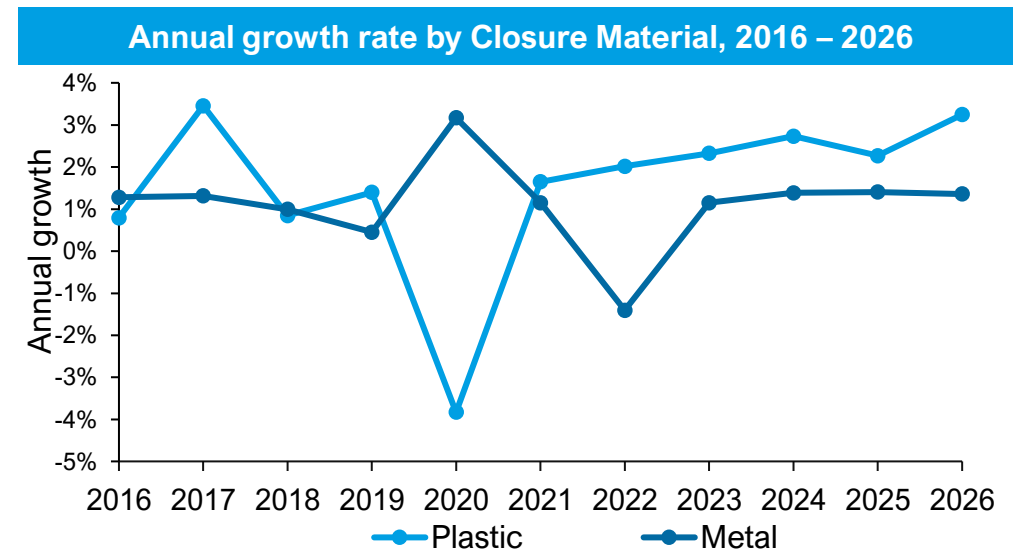
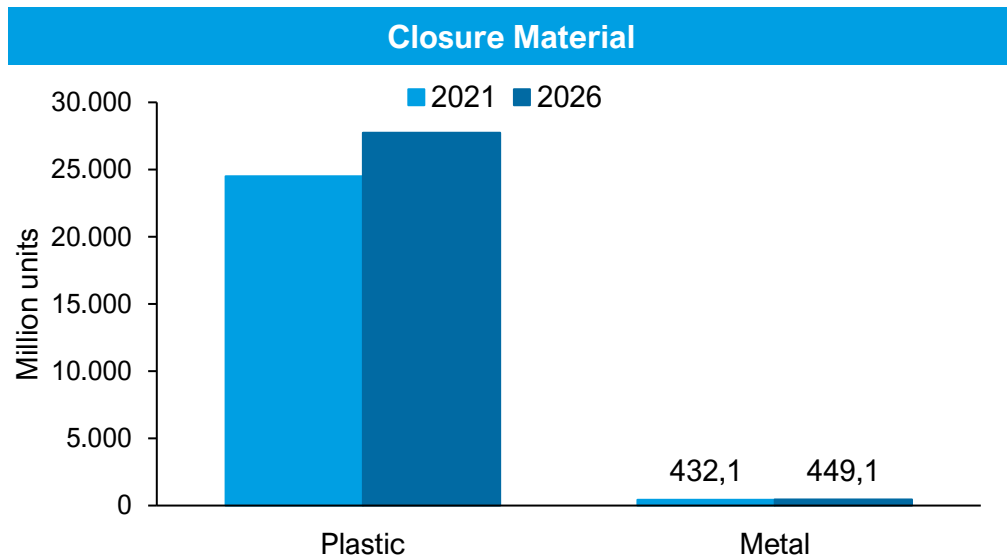
Annual growth rate by Pack Sub-Type, 2016 – 2026



*Includes Cup, Jar, Box, Specialty Container, Tube, Pod, Bubble Top, Keg/Drum, Cartridge, and Other Pack Type

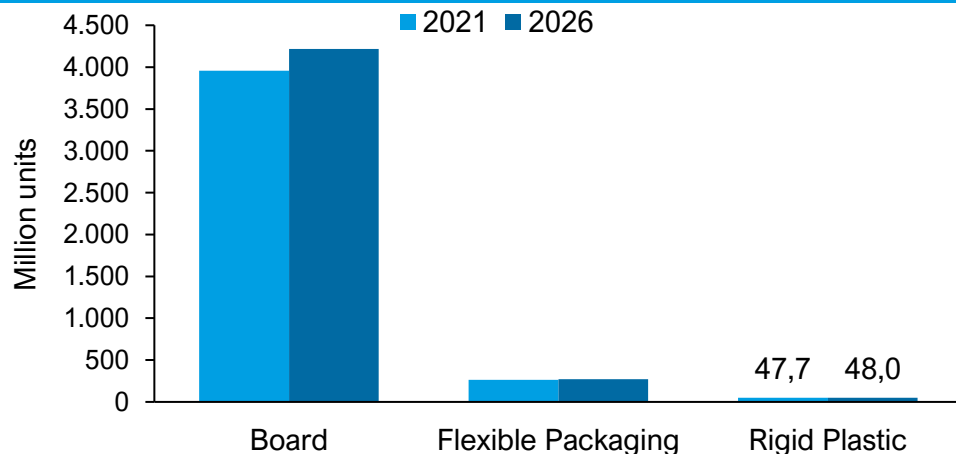
**Includes Tray - Microwaveable Plastic, Blister Pack - Plastic, Cup - Plastic, Bottle - Other Plastic, Jar - PET, Jar - HDPE, Box - Rigid Plastic, Specialty Container - Rigid Plastic, Jar - Other Plastic, Tube - Rigid Plastic, Pod - Plastic, Bubble Top - Plastic, Keg/Drum - Plastic, Cartridge - Plastic, and Other Rigid Plastic Pack Types - All Sub-types

Rigid Plastics – Growth Analysis by Closure Material and Closure Type

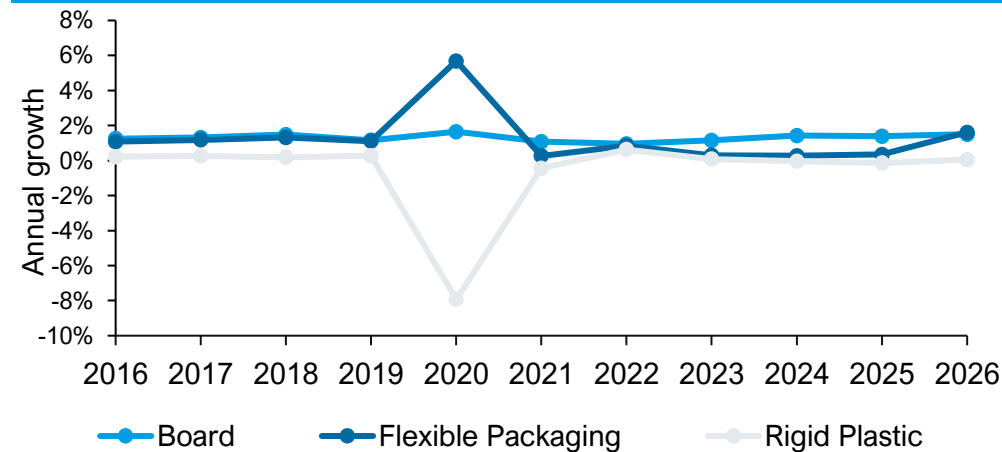


Rigid Plastics – Growth Analysis by Primary Outer Material and Type

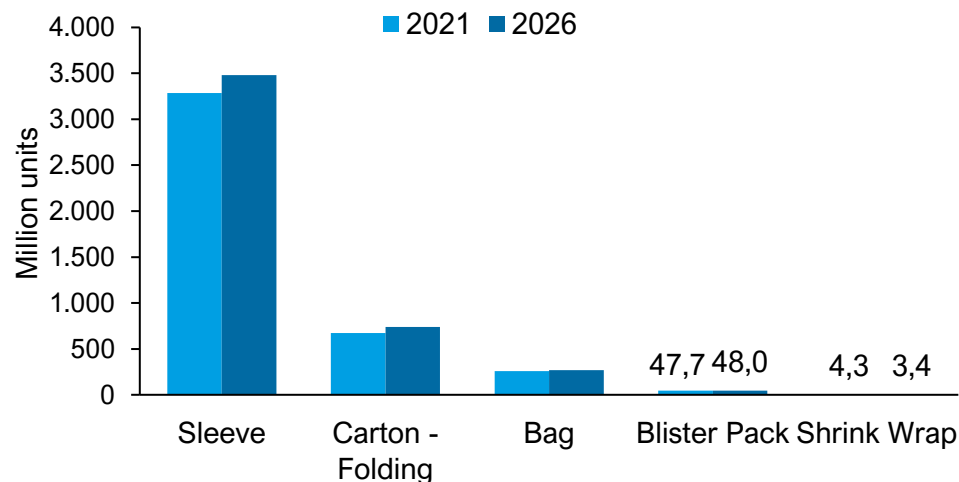
Primary Outer Material



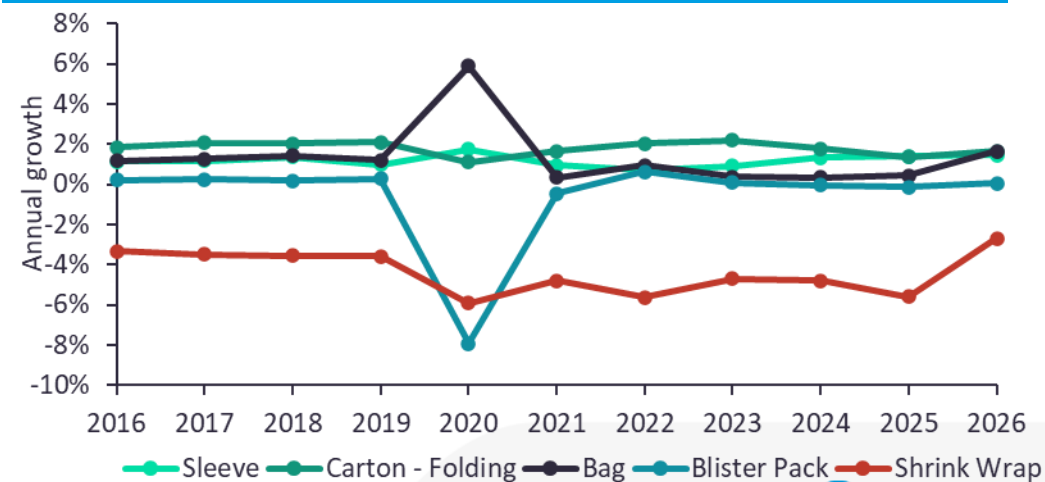
Annual growth rate by Primary Outer Material, 2016 – 2026



Primary Outer Type



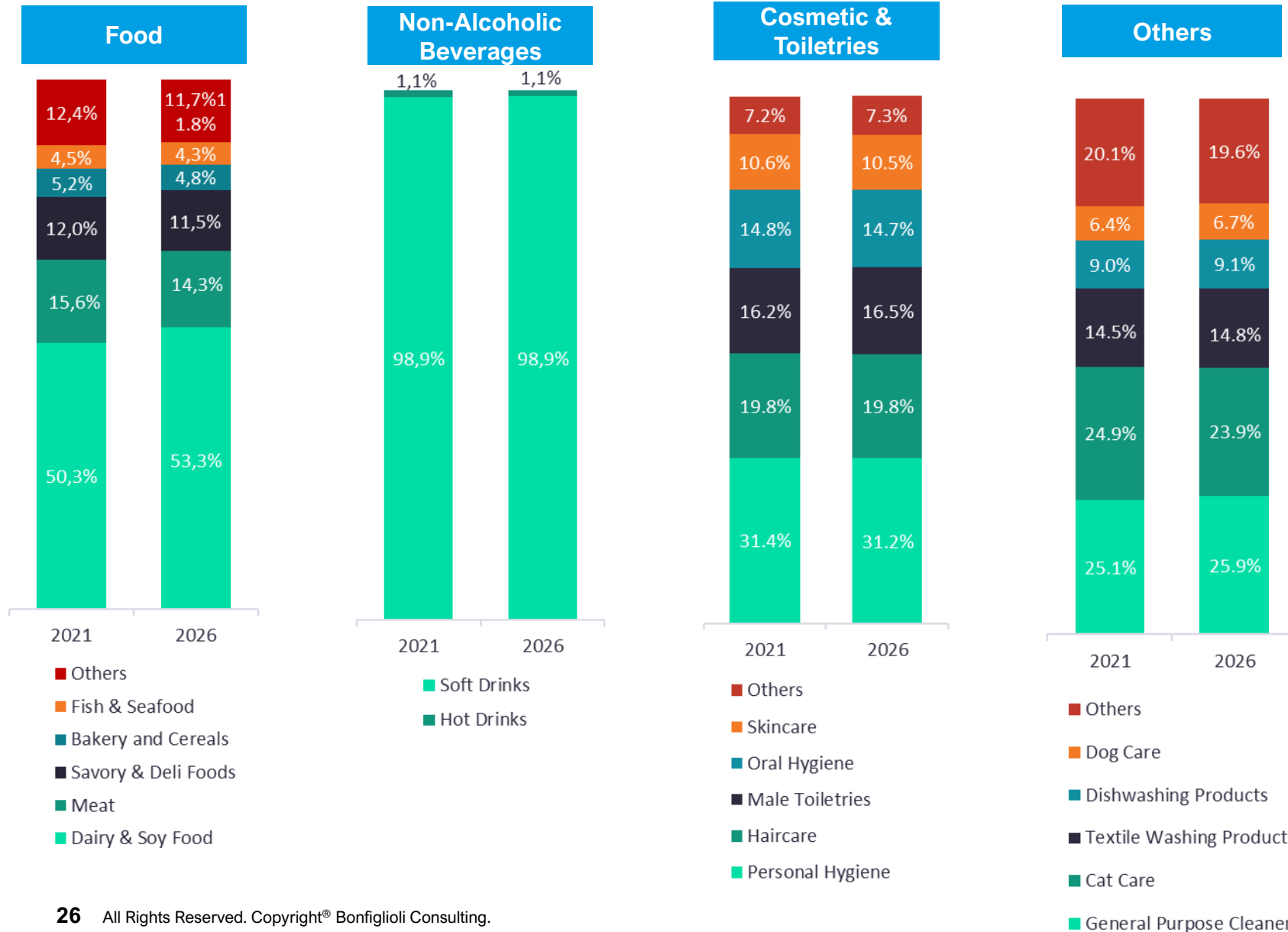
Annual growth rate by Primary Outer Type, 2016 – 2026



Rigid Plastics – Volume Share by Industry and Sector

		Industry volume (Million units)			Change in industry share, 2021–26 (PP)
Industry		2016	2021	2026	
Food		14,600.9	15,821.4	17,571.5	-0.4
	Dairy & Soy Food	7,370.9	7,963.2	9,372.4	3.0
	Meat	2,285.9	2,474.1	2,514.0	-1.3
	Savory & Deli Foods	1,689.1	1,893.3	2,017.5	-0.5
	Bakery and Cereals	761.4	824.2	846.3	-0.4
	Fish & Seafood	657.3	711.2	758.9	-0.2
	Others	1,836.3	1,955.4	2,062.3	-0.6
Non-Alcoholic Beverages		10,614.4	10,215.0	11,722.4	0.9
	Soft Drinks	10,512.2	10,100.0	11,591.8	0.01
	Hot Drinks	102.2	114.9	130.6	-0.01
Alcoholic Beverages		35.2	38.2	36.7	-0.02
	Beer & Cider	28.4	32.9	31.3	-1.0
	FAB	4.3	3.5	3.6	0.5
	Wine	1.3	1.0	1.1	0.3
	Spirits	1.16	0.7	0.8	0.3
Cosmetics & Toiletries		942.1	945.2	975.4	-0.3
	Personal Hygiene	274.2	296.9	304.8	-0.2
	Haircare	176.7	186.8	193.3	0.1
	Male Toiletries	169.6	153.4	161.1	0.3
	Others	321.5	308.0	316.2	-0.2
Others		1,453.1	1,592.6	1,695.4	-0.3
	General Purpose Cleaners	342.7	399.5	438.6	0.8
	Cat Care	379.9	396.0	405.1	-1.0
	Textile Washing Products	203.7	230.8	251.4	0.3
	Others	526.7	566.3	600.2	-0.2

Rigid Plastics – Growth Analysis by Industry



Rigid plastics are extensively used in the food industry due to its low cost, strength, safety, convenience, and light weight. The food industry accounted for 55.3% share or 15.8 billion units in 2021, with the dairy & soy food sector occupying the majority of the share.

This was followed by the non-alcoholic beverages industry which accounted for 35.7% share, with the soft drinks sector occupying the majority of the share.

Non-alcoholic beverages will be the fastest growing end-user industry for rigid plastics packs, with a CAGR of 2.8% during 2021–26.

Rigid Plastics – Innovative Packaging by Industry

Food

- Pastificio Rana Spa recently released a new Giovanni Rana branded Ragu Vegetale (Vegetable Ragout) in a 225g plastic bowl, offering a vegetarian alternative to the traditional meat-based sauce. The product is described as providing consumers with ease and convenience, increasing its appeal among those looking for on-the-go options.



Non-Alcoholic

- Ferrero S.p.A. has introduced its tea infusion drink which is available in a slender bottle like pack with a cap closure. The cap closure enables consumers effective control on dispensing, thus offering high functionality while on-the-go.



C&T

- Schwarzkopf & Henkel recently released a hair serum containing Liquid Keratin and Pearl Serum to aid in hair repair. The product comes with a hook-like top lid for easy opening. The product claims to provide an innovative mask effect that produces the best results in just 7 seconds. As a result, the pack includes the highlighted 7 seconds claim with concise typography. The overall design is enhanced by the black label and gold finish contours.



Other Industries

- The Lenor fabric softener was launched in a 1.4-liter plastic bottle. The "limited edition" product was co-developed with Italian model and tv personality, Ilary Blasi. The product comes in a rigid plastic bottle which ensures the product is spill-proof.



Analysis by Pack Material Rigid Metal



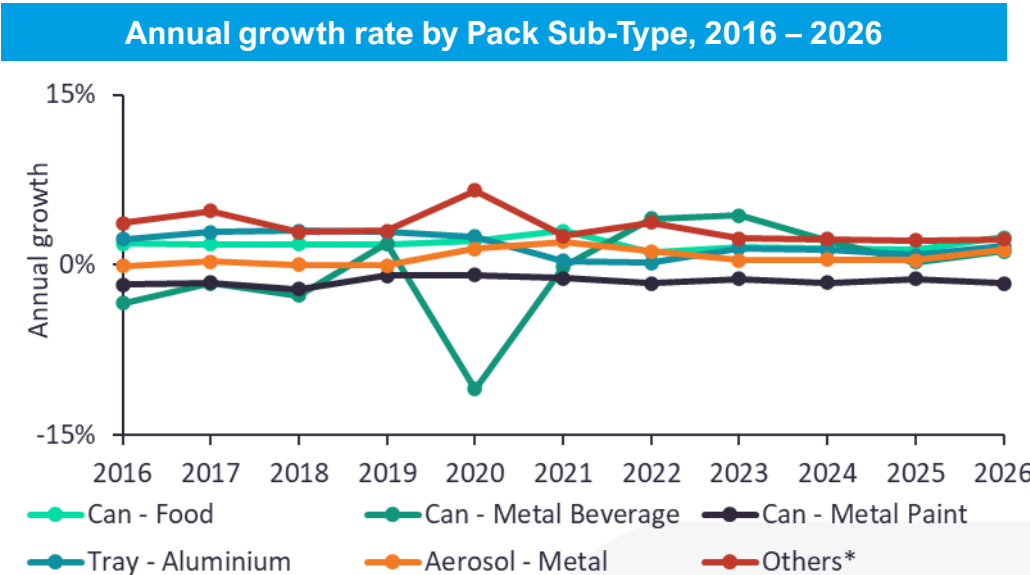
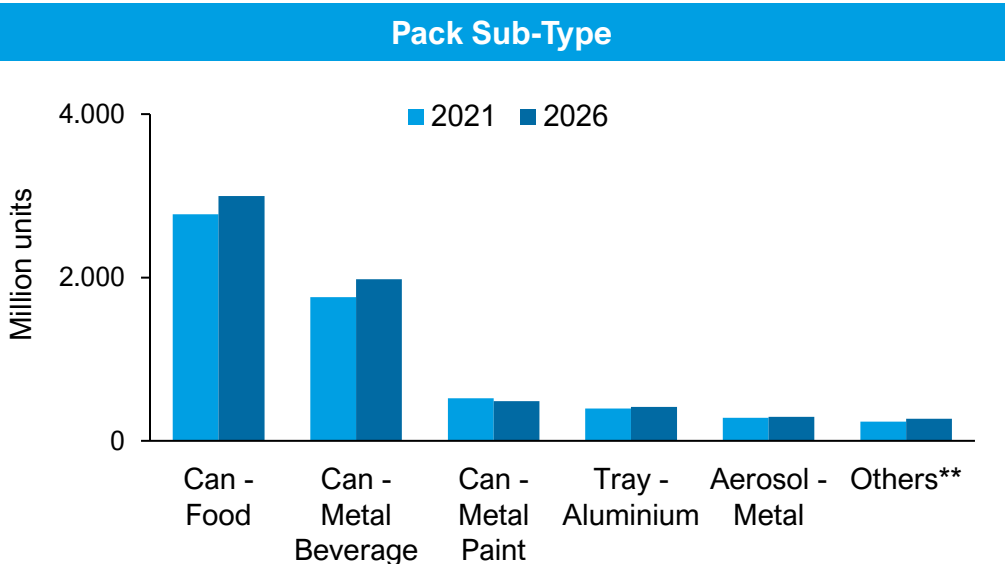
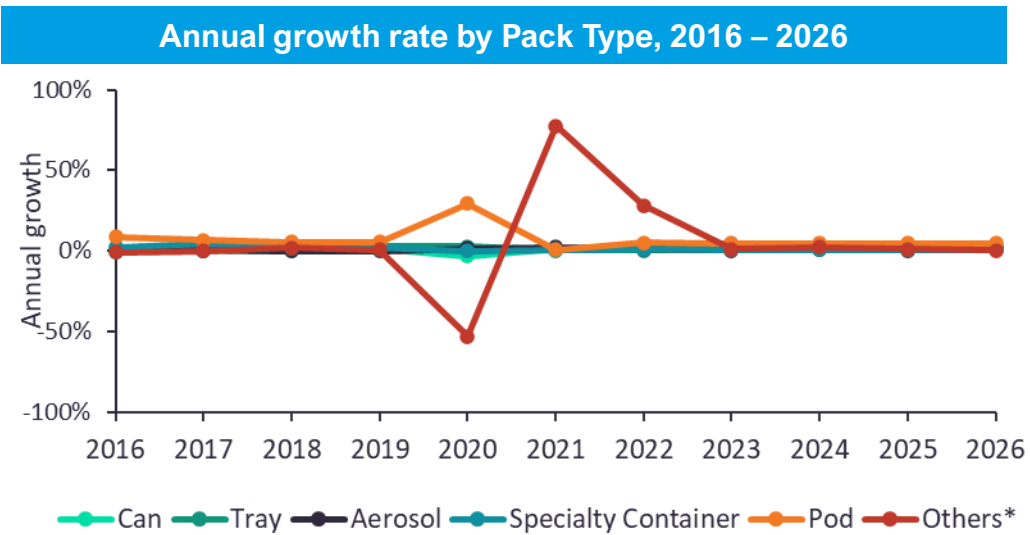
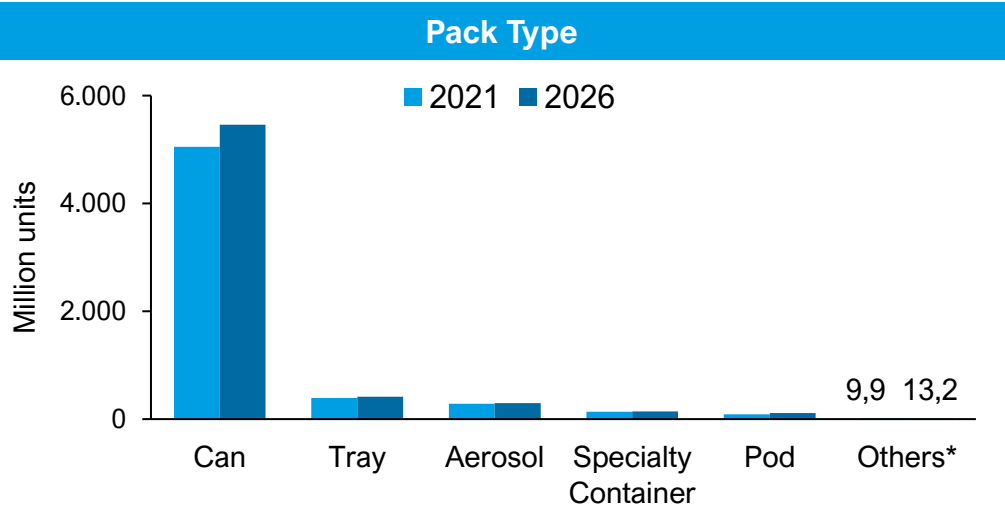
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Content Curation: Knowledge Office Bonfiglioli Consulting

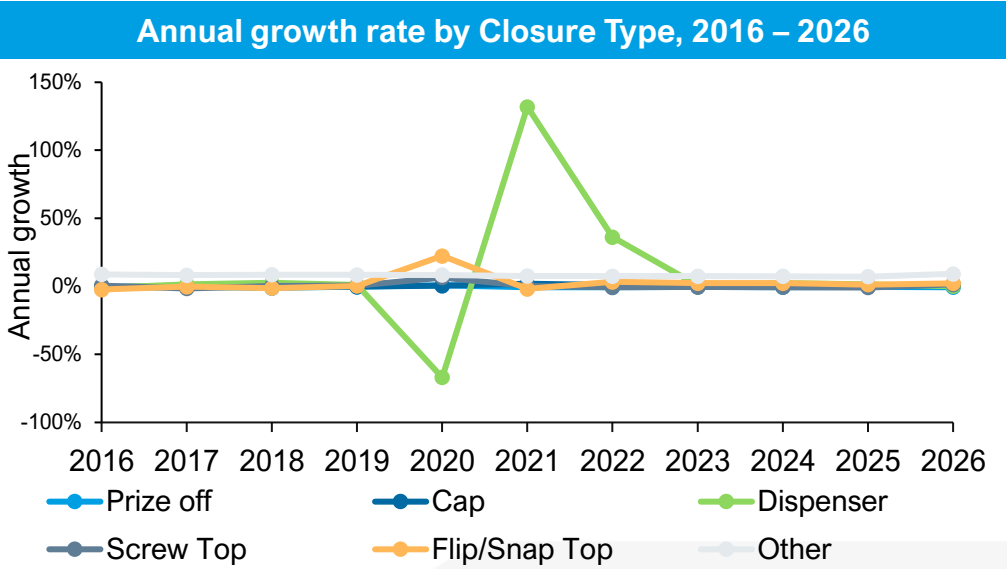
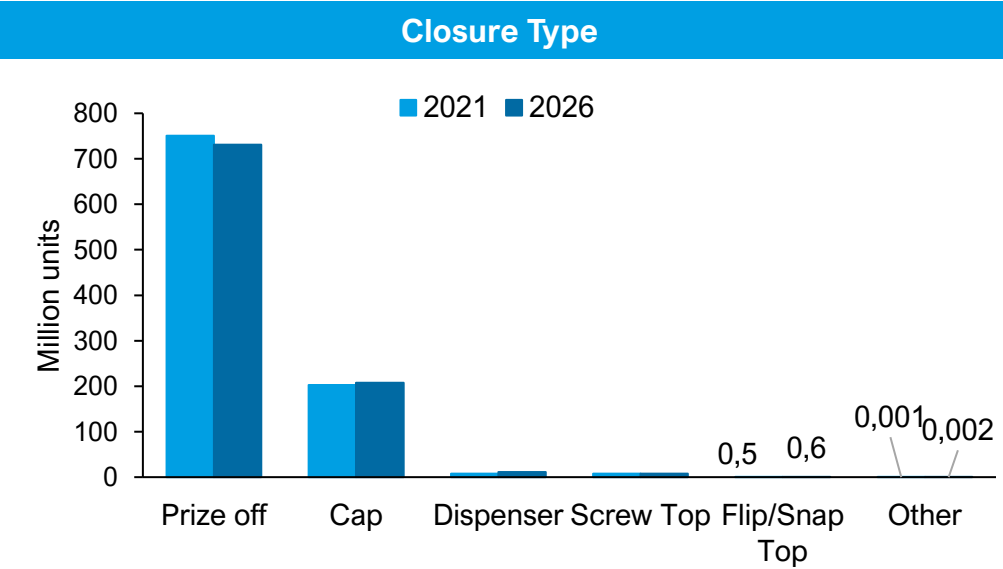
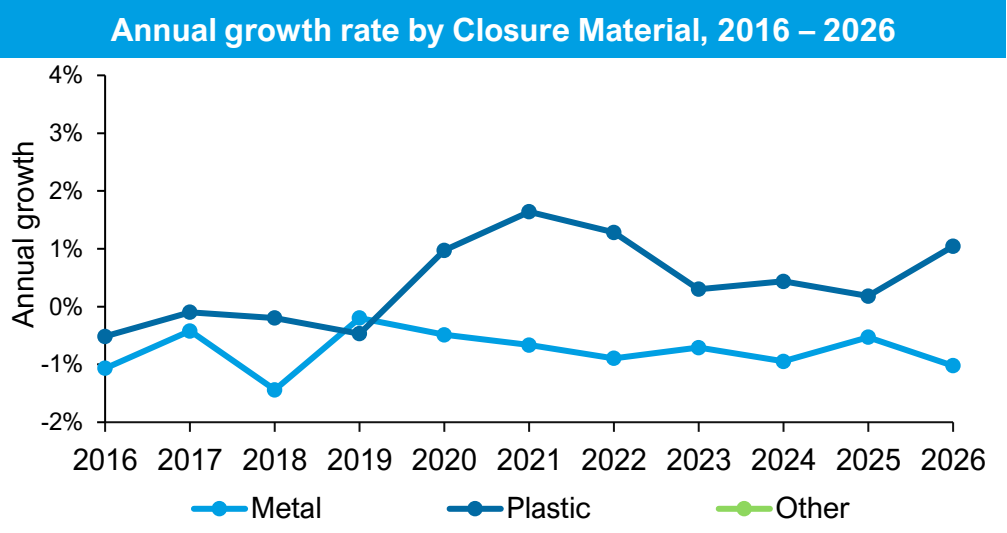
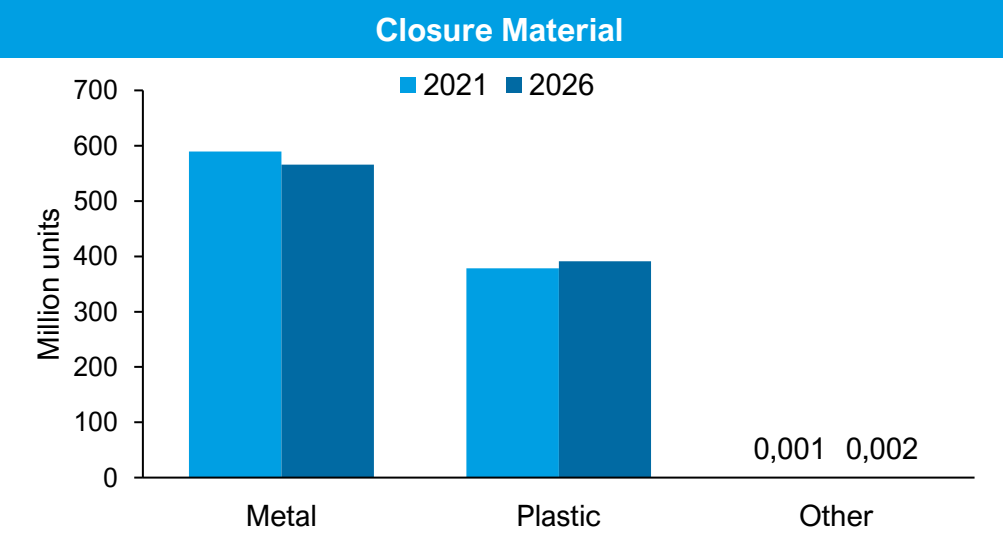
Rigid Metal by Industries – Key Takeaways

	Market overview	Key drivers	New product launches
Alcoholic	<ul style="list-style-type: none"> Rigid metal was moderately used in the alcoholic beverages industry, accounting for a share of 10.6% in 2021. It is expected to decline and reach 10.3% in 2026. Within alcoholic beverages, beer and cider products held more than 98.4% share in 2021. 	<ul style="list-style-type: none"> Rigid metal packaging helps to preserve and protect the alcohol stored in it and resists to chemical actions. This also helps to prevent the passage of oxygen, light, and gas, preserving the flavors of alcoholic beverages. 	<ul style="list-style-type: none"> There was no noteworthy product launch in these industries.
Non-Alcoholic	<ul style="list-style-type: none"> Rigid metal's usage in the non-alcoholic beverages industry stood at 22.1% in 2021 and is projected to reach 24% in 2026. Within non-alcoholic beverages, soft drinks held the majority share in 2021. 	<ul style="list-style-type: none"> Metal packaging in non-alcoholic beverages is largely driven by its convenience features such as small size, as well as eye-catching pack designs to draw consumers' attention. 	<ul style="list-style-type: none"> There was no noteworthy product launch in these industries.
Food	<ul style="list-style-type: none"> Rigid metal usage in the food industry stood at 47.6% in 2021 and is projected to grow and reach 47.8% in 2026. Within food, the fruit and vegetables sector occupied the largest share of 33.8% in 2021. 	<ul style="list-style-type: none"> Metal packaging is mostly considered for its ability to protect contents within from light and its high recyclability making it sustainable. Recyclability and reusability characteristics along with rising preference for on-the-go consumption among consumers are set to propel demand. 	<ul style="list-style-type: none"> Conserve Italia Soc. Coop. Agricola launched new Valfrutta al Vapore branded large tomato cubes. It is presented in a paperboard sleeve with 3x400g metal cans, following environment-conscious, sustainable packaging with better storage conditions.
Others	<ul style="list-style-type: none"> Rigid metal usage in other industries, recorded a share of 18.2% in 2021 and is expected to drop to 16.5% in 2026. Within other industries, the paints sector accounted for a significant share in 2021. 	<ul style="list-style-type: none"> Rigid metal is largely used in and pet care industries as they help in easy usage and convenient storage of products. 	<ul style="list-style-type: none"> There was no noteworthy product launch in these industries.

Rigid Metal – Growth Analysis by Pack Type and Pack Sub-Type

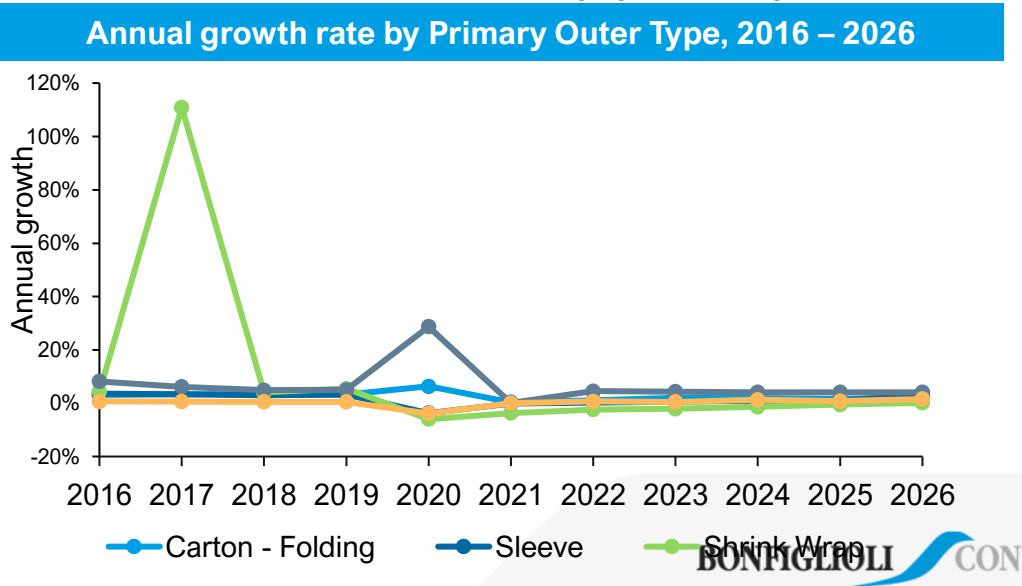
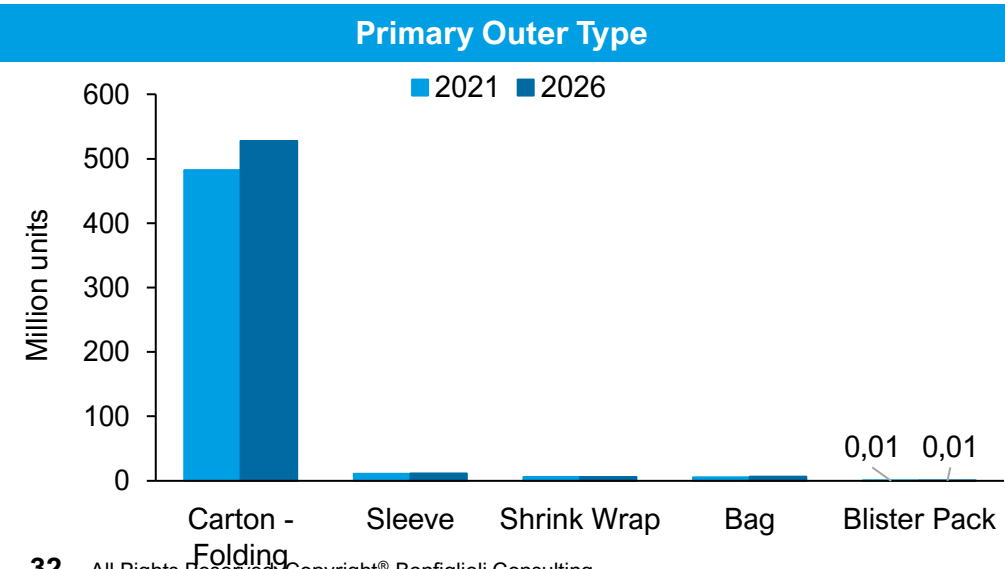
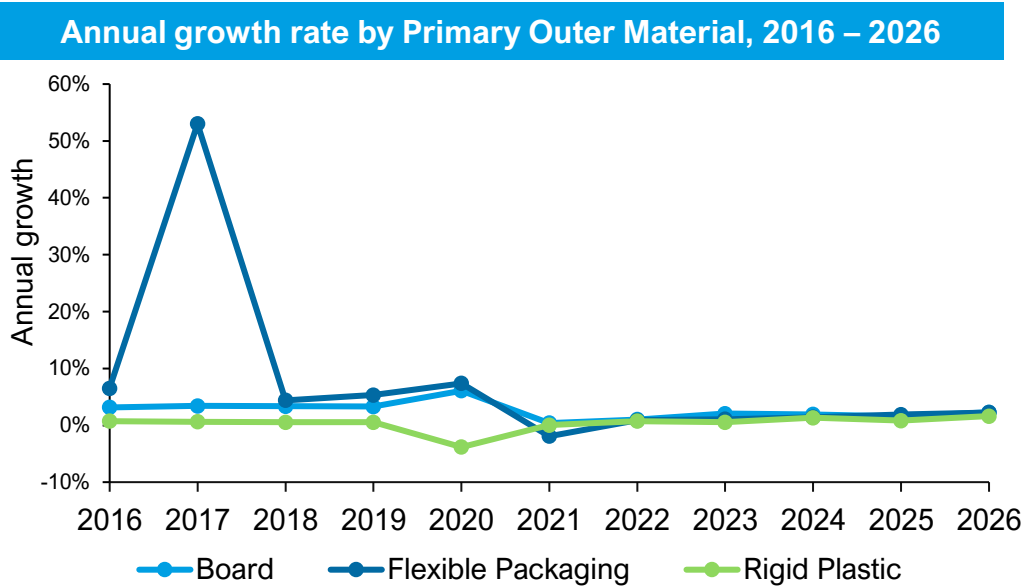
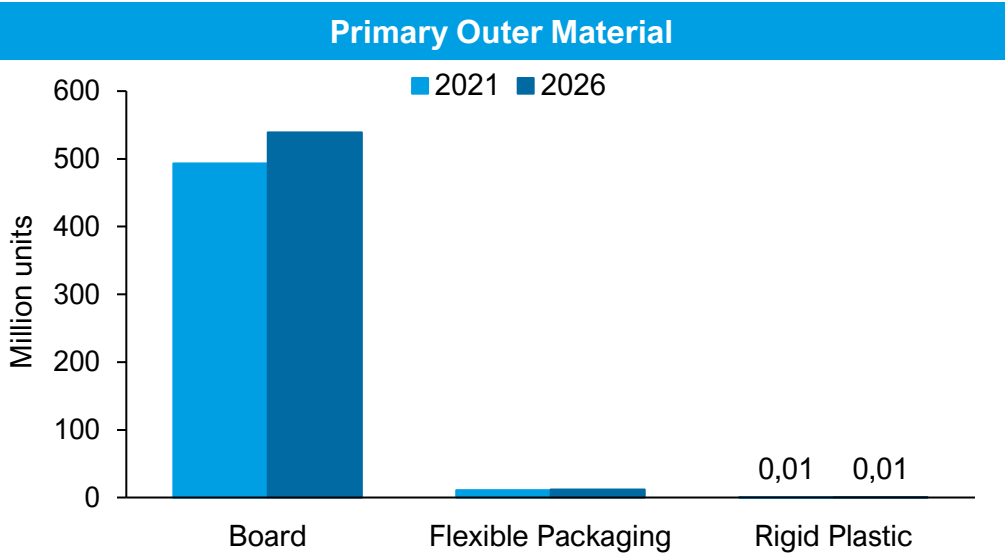


Rigid Metal – Growth Analysis by Closure Material and Closure Type



*Includes Flip/Snap Top and Cap

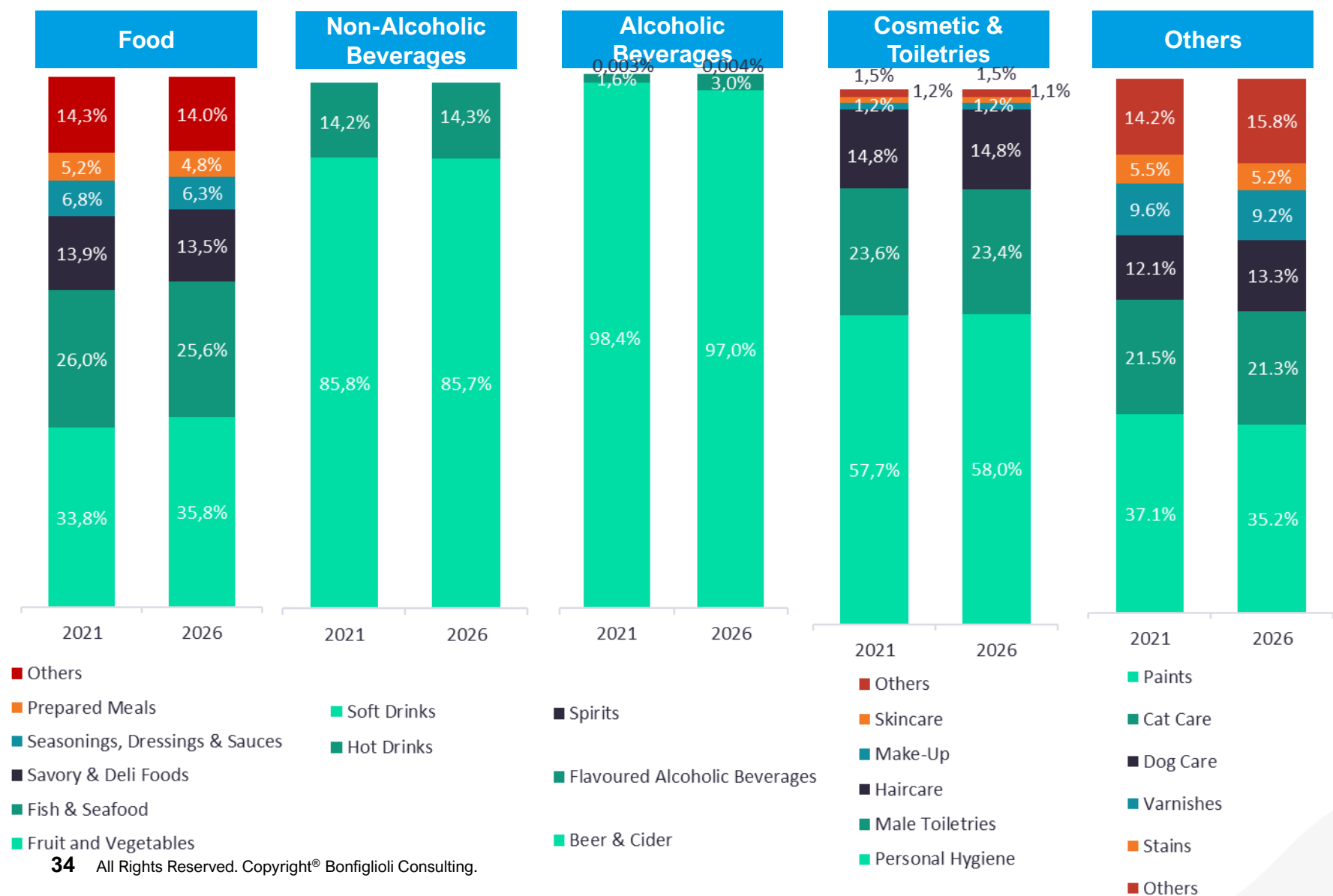
Rigid Metal – Growth Analysis by Primary Outer Material and Type



Rigid Metal – Volume Share by Industry and Sector

Industry	Industry volume (Million units)			Change in industry share, 2021–26 (PP)
	2016	2021	2026	
Food	2,534.8	2,840.7	3,077.5	0.2
Fruit and Vegetables	794.6	960.7	1,101.8	2.0
Fish & Seafood	693.1	737.8	787.2	-0.4
Savory & Deli Foods	351.9	394.7	416.6	-0.4
Seasonings, Dressings & Sauces	183.8	192.3	193.9	-0.5
Prepared Meals	131.7	147.7	149.0	-0.4
Others	379.9	407.5	429.1	-0.4
Non-Alcoholic Beverages	1,530.3	1,321.3	1,548.3	1.9
Soft Drinks	1,387.5	1,134.0	1,326.4	-0.2
Hot Drinks	142.8	187.4	221.9	0.2
Alcoholic Beverages	651.9	633.8	664.7	-0.3
Beer & Cider	642.9	623.8	645.1	-1.4
FAB	9.0	9.9	19.6	1.4
Spirits	0.03	0.02	0.02	0.0003
Cosmetics & Toiletries	86.1	86.2	89.4	-0.1
Personal Hygiene	47.4	49.7	51.8	0.2
Male Toiletries	23.0	20.3	20.9	-0.2
Haircare	12.0	12.7	13.3	0.1
Make-Up	1.3	1.1	1.1	-0.1
Others	2.5	2.3	2.4	-0.003
Others	1,103.5	1,089.3	1,061.5	-1.8
Paints	433.2	404.6	373.6	-2.0
Cat Care	236.5	234.0	225.7	-0.2
Dog Care	118.9	131.3	141.5	1.3
Others	314.9	319.4	320.7	0.9

Rigid Metal – Growth Analysis by Industry



In rigid metal packaging, food accounted for the highest volume share of 47.6% or 2.8 billion units in 2021. Non-alcoholic beverages industry was the second leading industry with a share of 22.1% in 2021.

Within the food industry, the fruit and vegetables sector accounted for 33.8% share in 2021 for rigid metal packaging usage followed by fish & seafood and savory & deli foods with the shares of 26% and 13.9% respectively.

Non-alcoholic beverages accounted for a market size of 13.2 billion units in 2021. Within the industry soft drinks accounted for the major share of 85.8%.

Non-alcoholic beverages will be the fastest growing end-user industry for rigid metal packs, with a CAGR of 3.2% during 2021–26.

Rigid Metal – Innovative Packaging by Industry

Food

- Conserve Italia Soc. Coop. Agricola launched new Valfrutta al Vapore branded large tomato cubes that are processed using steam and come from specific regions of Italy. It is presented in a paperboard sleeve with 3x400g metal cans, following environment-conscious, sustainable packaging with better storage conditions.



C&T

- Biopoint Srl launched Biopoint Styling Creation brand styling wax spray in a non-printed impact extruded aluminum aerosol can. The small trigger spray actuator works well in combination with the slender can provide ergonomic handling and easy directional dispensing. As an innovative feature, "embossed" effect was created on the aerosol can via labelling.



Analysis by Pack Material Paper & Board

Source: GlobalData

Content Curation: Knowledge Office Bonfiglioli Consulting

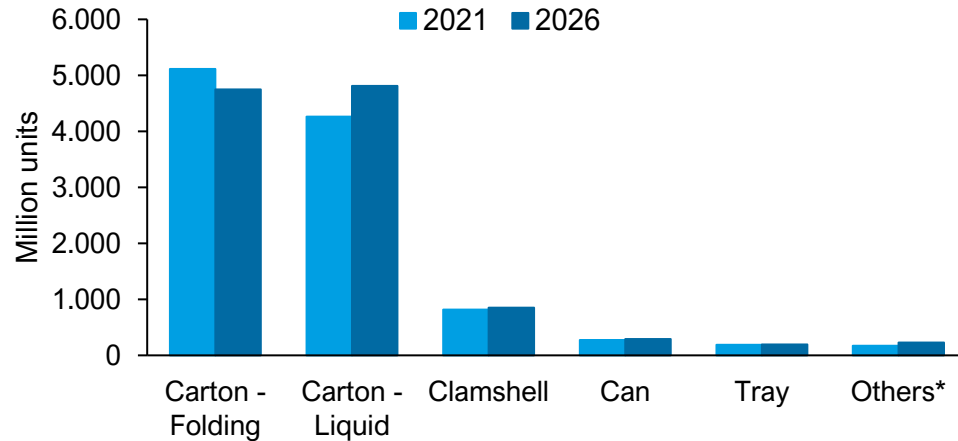


Paper & Board by Industries – Key Takeaways

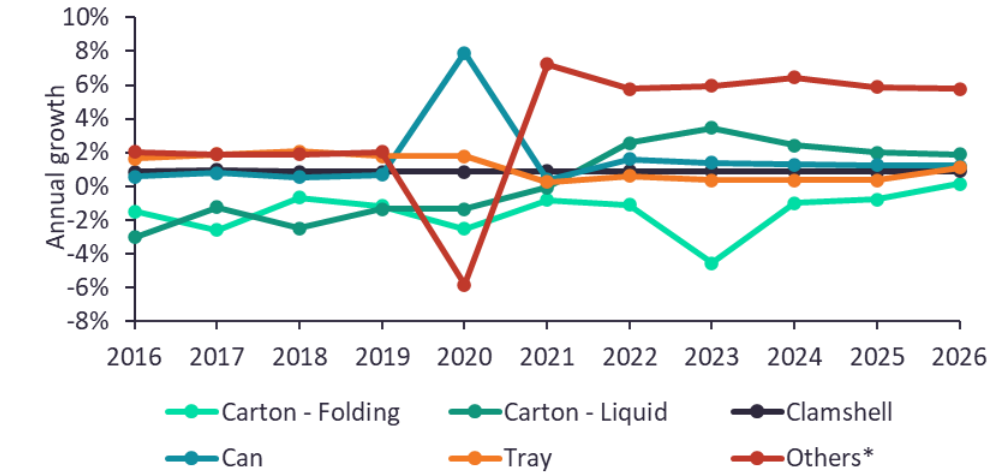
	Market overview	Key drivers	New product launches
Alcoholic	<ul style="list-style-type: none"> Paper & board was significantly used in the food industry, accounting for a share of 48.1% in 2021. It is projected to reach 50.6% in 2026. Within food, dairy & soy food sector held the majority share. 	<ul style="list-style-type: none"> Longer shelf-life and eco-friendly properties are major drivers of paper & board packaging, largely used by the dairy food sector. 	<ul style="list-style-type: none"> Barilla G. e R. Fratelli introduced red lentil flour, which is claimed to be high in protein and gluten-free. The product is packaged in a 250g shrink-wrapped paperboard box with labels such as gluten-free, plant-based protein, and fiber-enriched to appeal to health-conscious consumers.
Non-Alcoholic	<ul style="list-style-type: none"> Paper & board usage in the non-alcoholic beverages industry stood at 11.7% in 2021 and is expected to reach 14.2% in 2026. Within non-alcoholic beverages, soft drinks held the majority share in 2021. 	<ul style="list-style-type: none"> Paper & board packaging is popular for its portability and convenience in the non-alcoholic beverages sector. These is convenient for printing and is considered to be inexpensive packaging. 	<ul style="list-style-type: none"> Lavazza Eco Caps brand coffee capsules were launched in printed cartonboard tray-style outer carton with glued ends. Each capsule is hermetically sealed with "aroma safe" technology, providing barrier protection and eliminates the need for any additional protective packaging.
Food	<ul style="list-style-type: none"> Paper & board usage in the cosmetics & toiletries industry stood at 1% in 2021 and is expected to remain unchanged in 2026. Within cosmetics & toiletries, male toiletries held the majority share in 2021. 	<ul style="list-style-type: none"> Recyclability and decomposability make the paper-based packaging comparatively more sustainable than other materials. 	<ul style="list-style-type: none"> Beiersdorf AG launched a new face cleanser which comes in a 75g paperboard box. The product packaging is claimed to be recyclable, which will likely appeal to consumers looking for environmentally friendly products.
Others	<ul style="list-style-type: none"> Other industries recorded a sizable share of 33.2% in 2021 and is expected to decline and reach 28.5% in 2026, in terms of using paper & board. Within other industries, cigarettes occupied the highest share (85.8%) in 2021. 	<ul style="list-style-type: none"> Manufacturers are taking steps to make product packaging more interactive in order to increase customer engagement. Customers prefer this packaging because it is environmentally friendly, cost-effective, and lightweight. 	<ul style="list-style-type: none"> Soffass S.p.A. released a new Regina Rotoloni Eco branded environment-friendly toilet tissue, produced using electricity exclusively from renewable sources. The release is presented in a "paper wrapper suitable for recycling".

Paper & Board – Growth Analysis by Pack Type and Pack Sub-Type

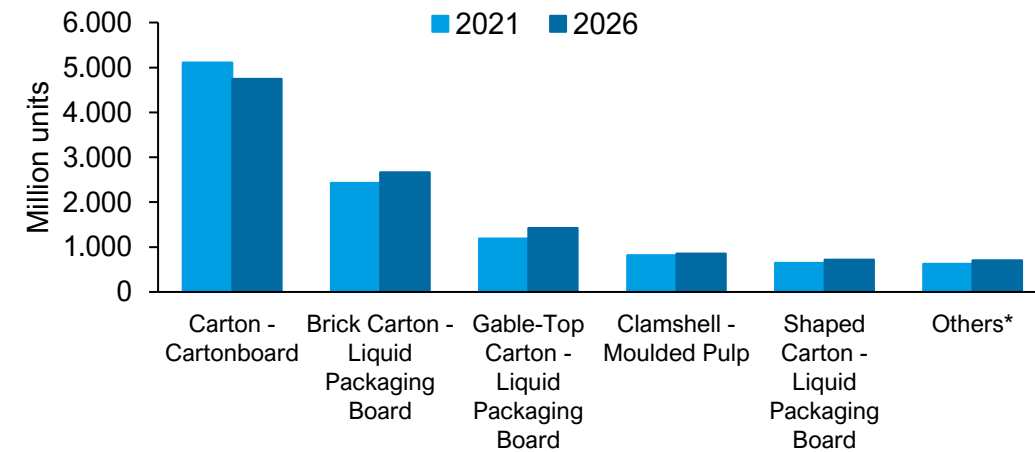
Pack Type



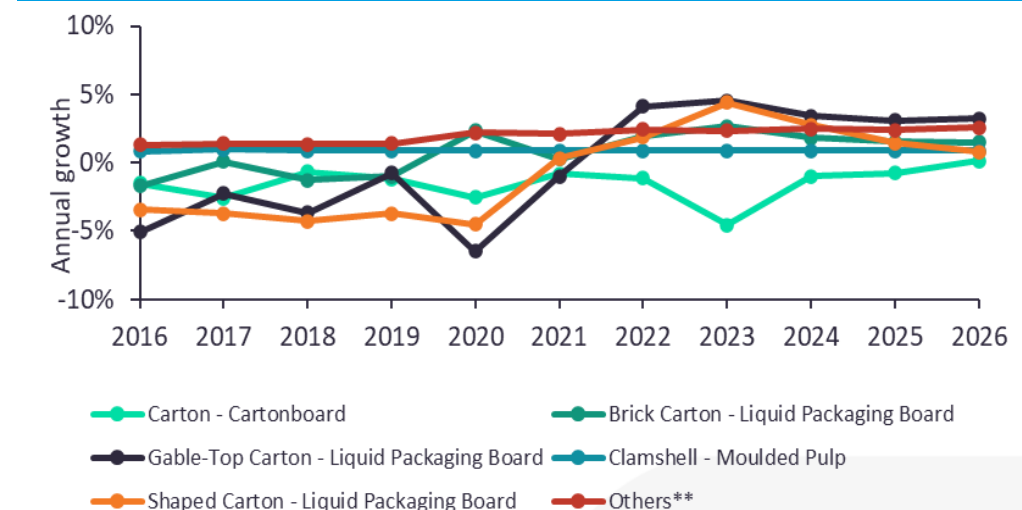
Annual growth rate by Pack Type, 2016 – 2026



Pack Sub-Type



Annual growth rate by Pack Sub-Type, 2016 – 2026

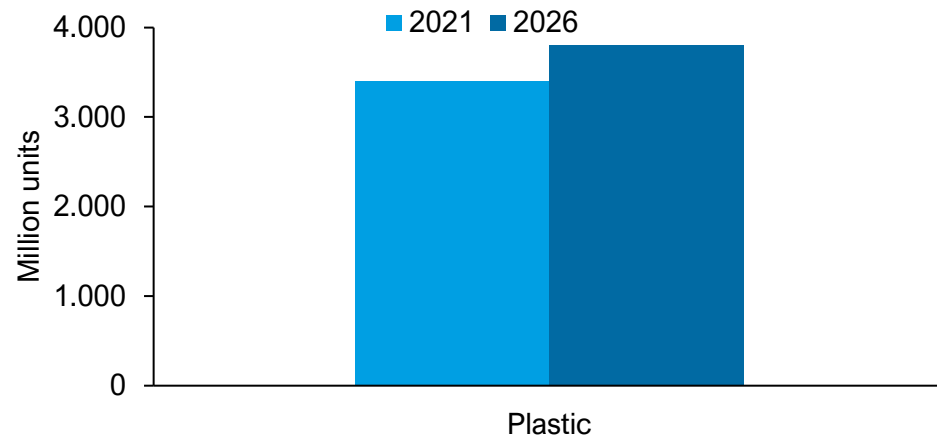


*Includes Tub, Box, Bag-in-Box, Sleeve, and Pod

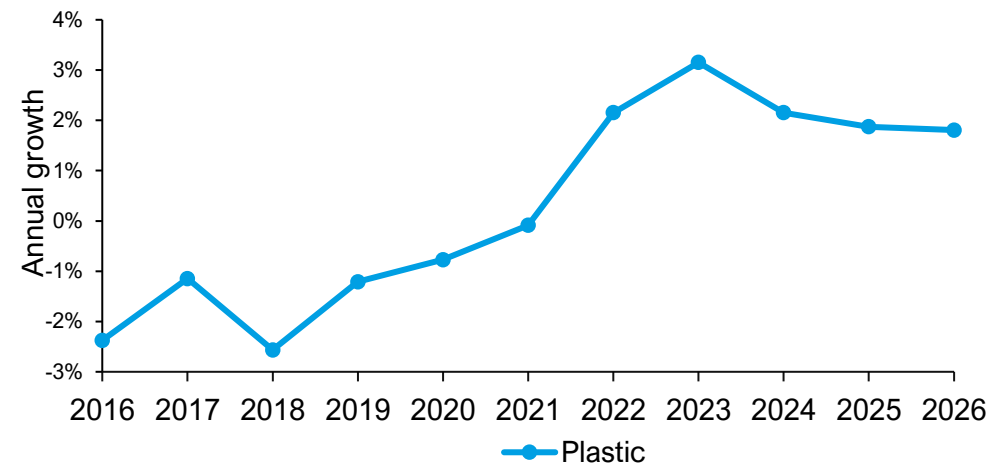
**Includes Can - Board Composite, Tray - Cartonboard, Tub - Liquid Packaging Board, Tub - Cartonboard, Box - Liquid Packaging Board, Bag-in-Box - Containerboard, Sleeve - Cartonboard, and Pod - Paper

Paper & Board – Growth Analysis by Closure Material and Closure Type

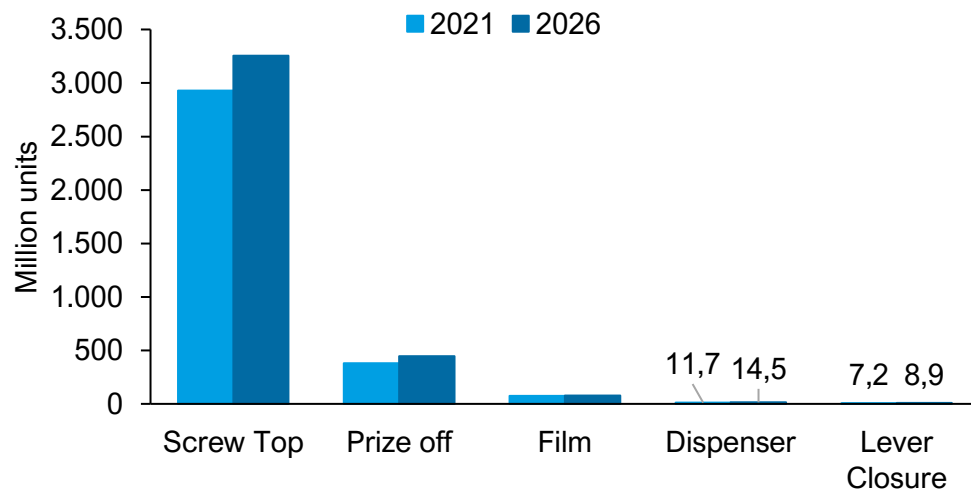
Closure Material



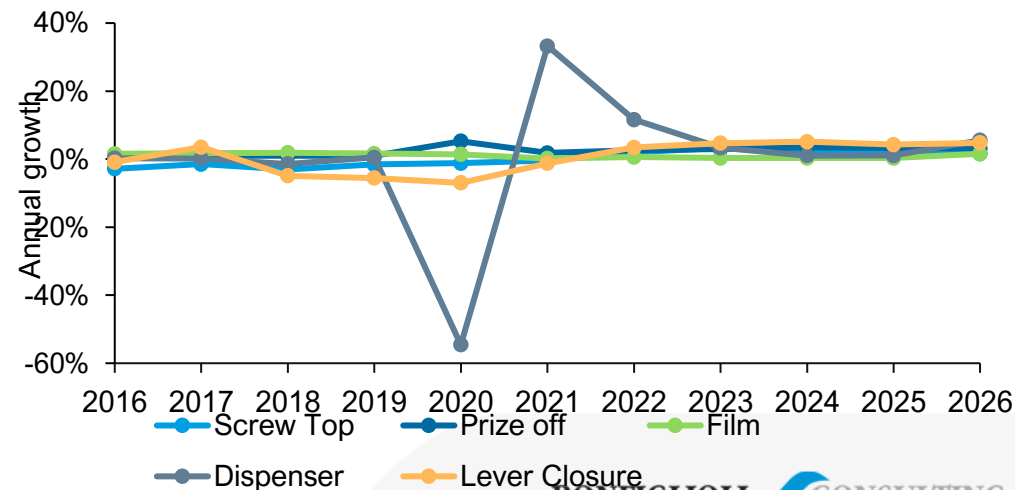
Annual growth rate by Closure Material, 2016 – 26



Closure Type

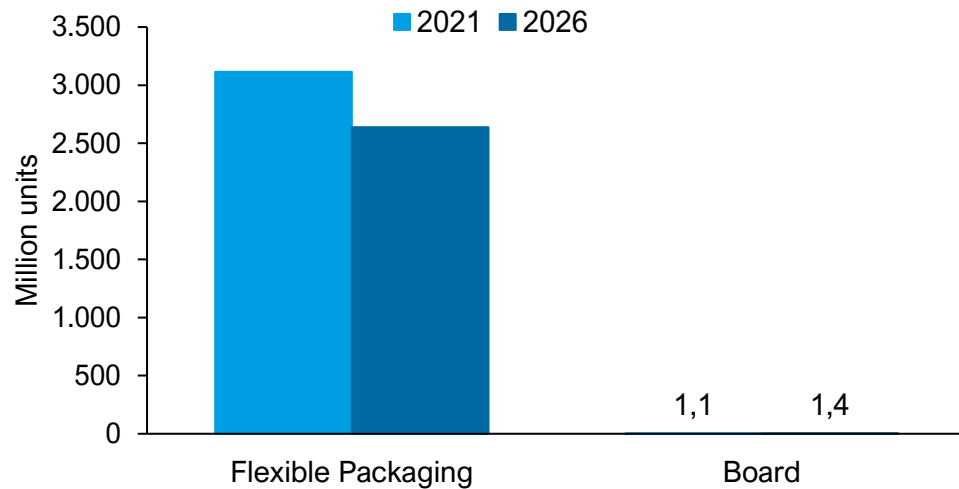


Annual growth rate by Closure Type, 2016 – 26

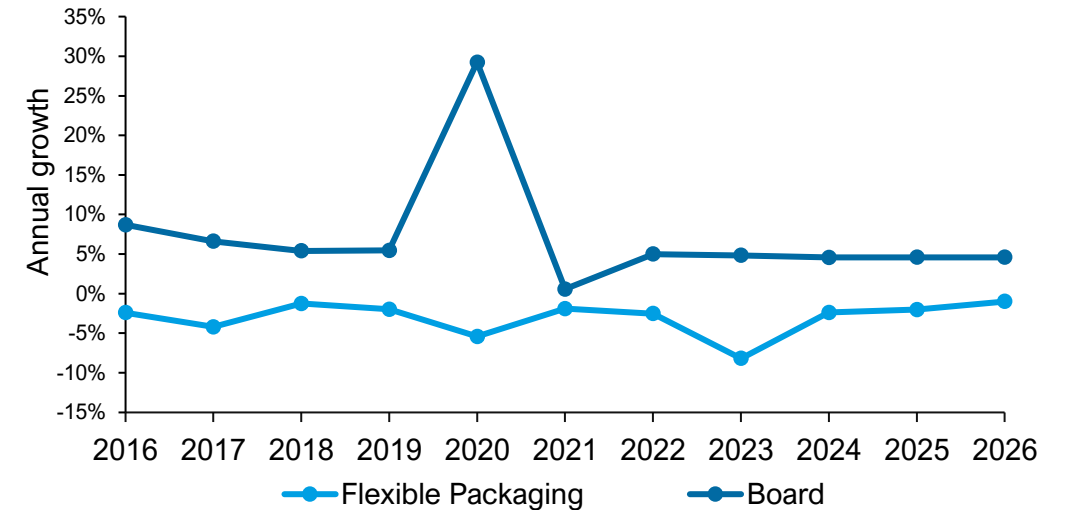


Paper & Board – Growth Analysis by Primary Outer Material and Primary Outer Type

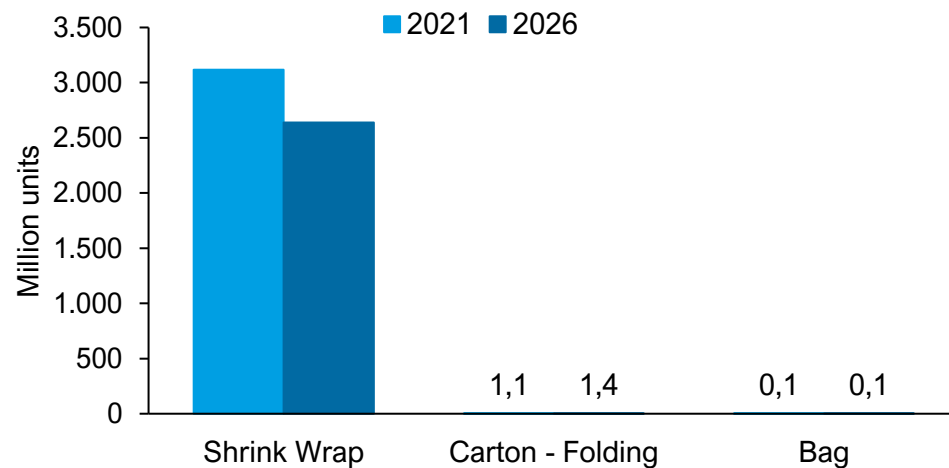
Primary Outer Material



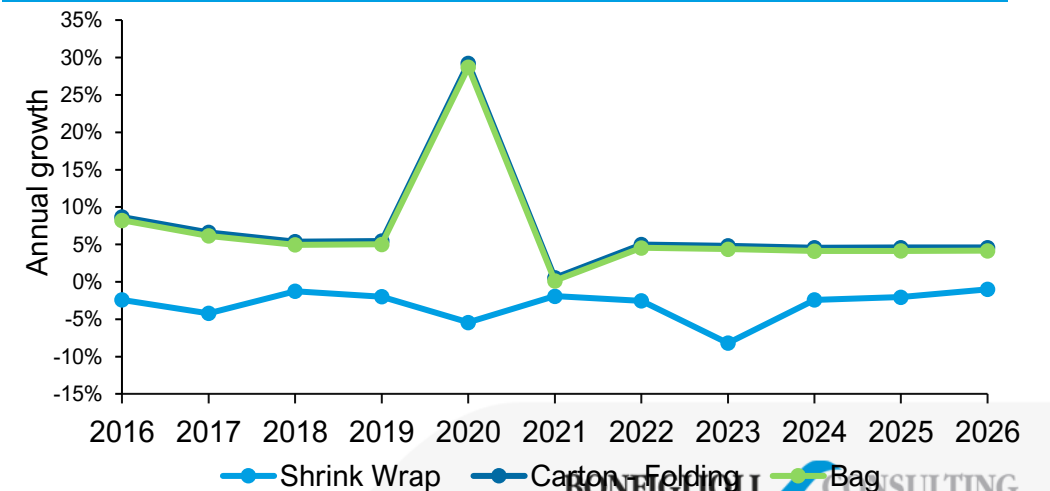
Annual growth rate by Primary Outer Material, 2016 – 26



Primary Outer Type



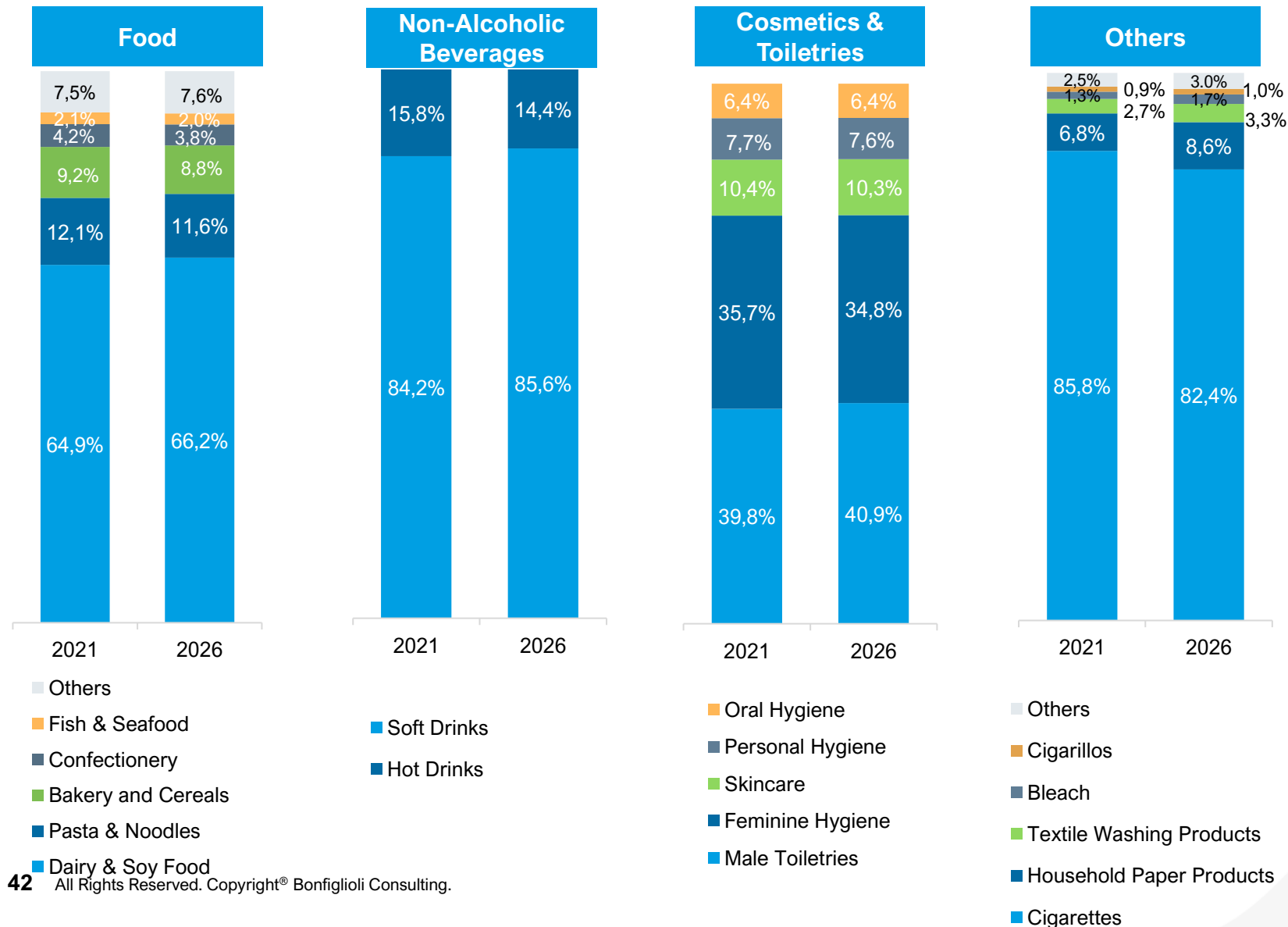
Annual growth rate by Primary Outer Type, 2016 – 26



Paper & Board – Volume Share by Industries and Sectors

		Industry volume (Million units)			Change in industry share, 2021–26 (PP)
Industry		2016	2021	2026	
Food		5,137.7	5,204.4	5,622.9	2.5
	Dairy & Soy Food	3,388.0	3,377.2	3,723.5	1.3
	Pasta & Noodles	618.9	631.9	650.5	-0.6
	Bakery and Cereals	450.5	481.2	493.5	-0.5
	Confectionery	224.4	216.0	213.5	-0.4
	Fish & Seafood	105.7	109.9	113.0	-0.1
	Others	350.3	388.2	428.9	0.2
Non-Alcoholic Beverages		1,519.9	1,262.7	1,574.9	2.5
	Soft Drinks	1,347.3	1,062.8	1,348.3	1.4
	Hot Drinks	172.6	199.8	226.6	-1.4
Cosmetics & Toiletries		109.7	104.0	106.7	-0.002
	Male Toiletries	45.7	41.4	43.6	1.1
	Feminine Hygiene	38.6	37.2	37.1	-0.9
	Skincare	11.2	10.8	11.0	-0.1
	Personal Hygiene	7.2	8.0	8.2	-0.04
	Oral Hygiene	7.0	6.6	6.8	-0.02
Others		4,051.6	3,594.3	3,166.2	-4.8
	Cigarettes	3,607.0	3,082.7	2,608.6	-3.4
	Household Paper Products	217.5	245.4	273.4	1.8
	Textile Washing Products	84.1	96.3	105.2	0.6
	Others	143.0	169.8	179.0	0.9

Paper & Board – Growth Analysis by Industries



Paper & board is extensively used in the food industry on account of its light weight and eco-friendly nature. It is thought to be biodegradable, sustainable, effective, and economical. It is available in various forms and can adjust to different conditions. Within paper & board, the food industry accounted for the highest volume share of 48.1% or 5.2 billion units in 2021.

Within food industry, the dairy & soy food sector accounted for 64.9% share in 2021, followed by pasta & noodles and bakery and cereals sectors.

Non-alcoholic beverages will be the fastest growing end-user industry for paper & board packs, with a CAGR of 4.5% during 2021–26.

Paper & Board – Innovative packaging by industry

Food

- Barilla G. e R. Fratelli launched red lentil flour which is claimed to have high protein and is free from gluten. The product is available in a 250g shrink-wrapped paperboard box, featuring tags such as gluten-free, plant-based protein, and enriched with fiber, appealing to health-conscious consumers.



Non-Alcoholic

- Lavazza Eco Caps brand coffee capsules were launched in printed cartonboard tray-style outer carton with glued ends. Each capsule is hermetically sealed with "aroma safe" technology, providing barrier protection and eliminates the need for any additional protective packaging (e.g. outer sachet). The capsules are made of recyclable compostable material, to attract environmental-conscious consumers.



Other Industries

- Soffass S.p.A. released a new Regina Rotoloni Eco branded environment-friendly toilet tissue, produced using electricity exclusively from renewable sources. The release is presented in a "paper wrapper suitable for recycling"



C&T

- Beiersdorf AG launched a new face cleanser which is claimed to effectively remove make-up without leaving oily residues and has a neutral PH. It is also claimed to be eco-friendly. The product is available in a 75g paperboard box. The product packaging is claimed to be recyclable which is likely to appeal to consumers who seek sustainable products.



Analysis by Pack Material Flexible Packaging



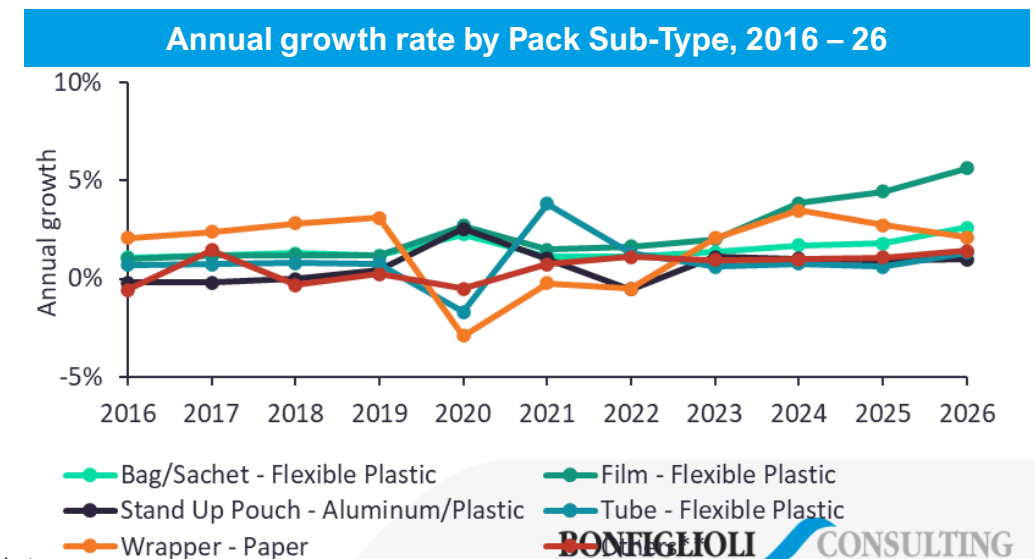
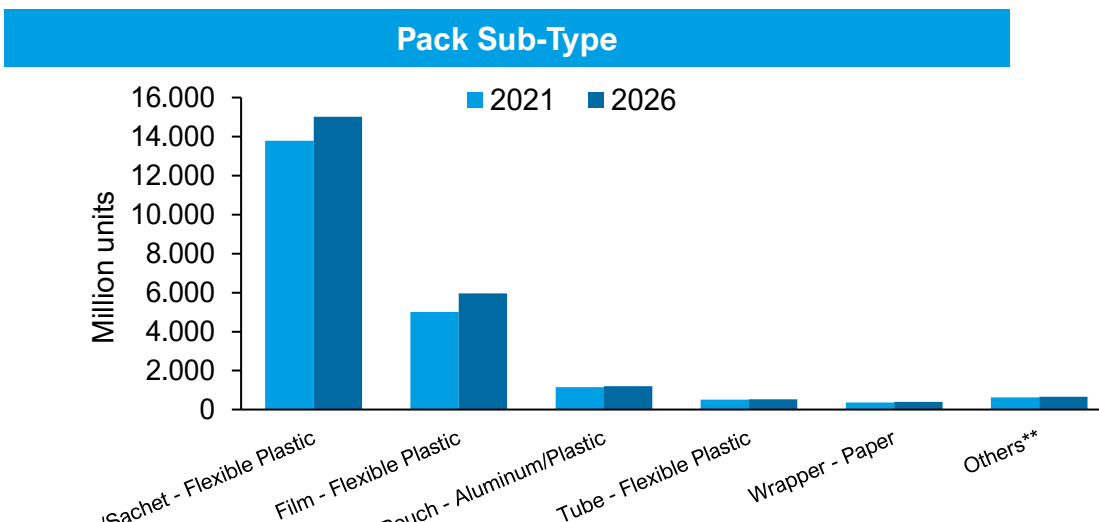
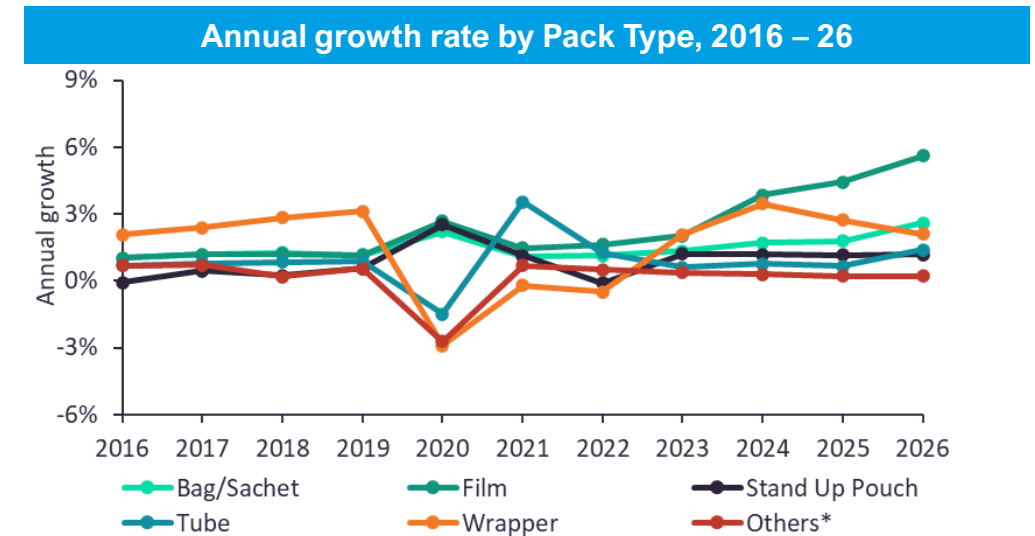
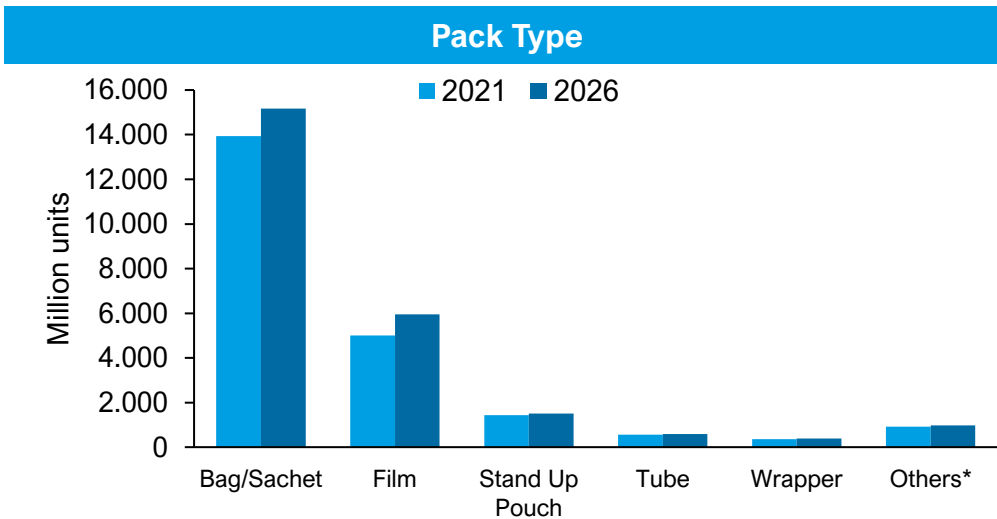
Source: GlobalData

Content Curation: Knowledge Office Bonfiglioli Consulting

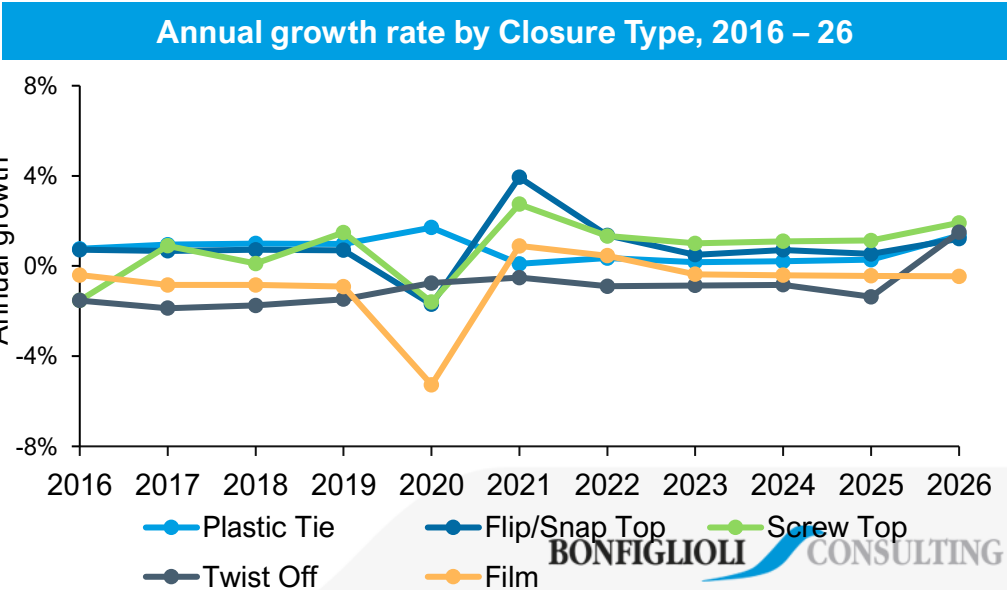
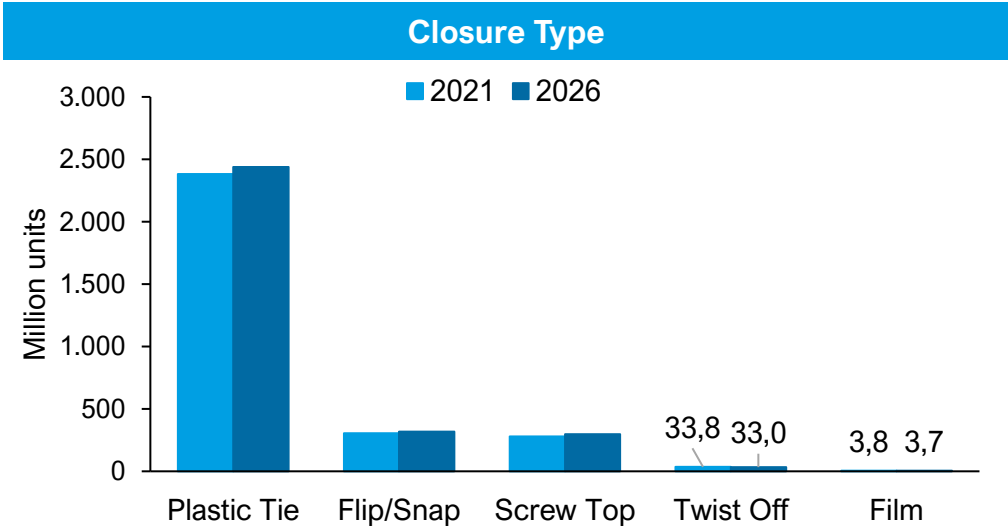
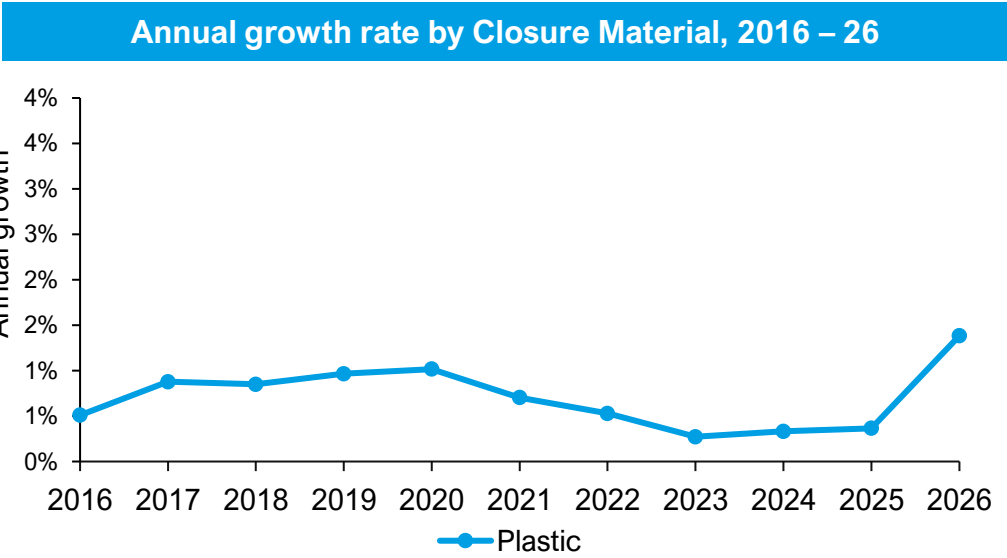
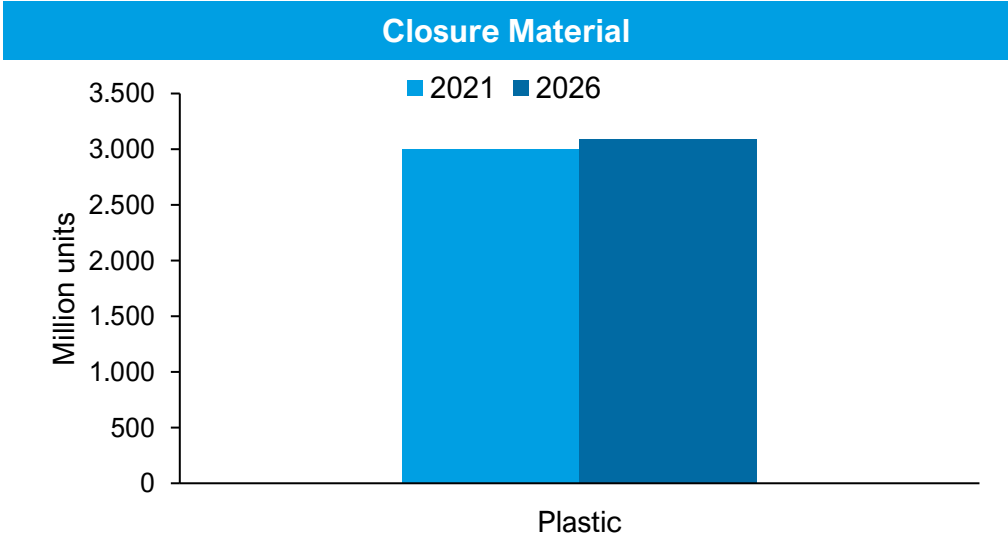
Flexible Packaging by Industries – Key Takeaways

	Market overview	Key drivers	New product launches
Food	<ul style="list-style-type: none"> Food industry is the most prominent industry using flexible packaging, with a share of 81.4% in 2021. Within the food industry, bakery and cereals occupied the highest share of 36.2% in 2021. 	<ul style="list-style-type: none"> Convenience and portability drive the usage of flexible packaging in the food industry. The soft and flexible nature of this pack material allows for the packaging to be molded into any shape and size desired by the customer. 	<ul style="list-style-type: none"> Latteria Montello Spa launched Stracchino Nonno Nanni branded fresh, soft cheese, packed in a printed opaque barrier film flow-wrap, made with biodegradable, compostable bio-based film. The compostable format is overtly communicated to the consumer on the front of the pack.
Non-Alcoholic	<ul style="list-style-type: none"> Non-alcoholic beverages industry, in terms of using flexible packaging, recorded a share of 1.6% in 2021. Within the non-alcoholic beverage industry, hot drinks occupied 84.4% share in 2021. 	<ul style="list-style-type: none"> Flexible packaging increases the shelf life of the beverages by protecting them from sunlight, moisture and temperature. Convenience and portability are strong drivers of this packaging material. 	<ul style="list-style-type: none"> There was no noteworthy product launch in these industries.
C&T	<ul style="list-style-type: none"> Cosmetics & toiletries industry in terms of using flexible packaging, recorded a share of 3.6% in 2021, which is expected to decline and reach 3.4% in 2026. Within cosmetics & toiletries, oral hygiene occupied the highest share of 45.2% in 2021. 	<ul style="list-style-type: none"> Rise in demand for feminine hygiene products will foster the growth of flexible packaging through 2026. Haircare will also intensify further usage of flexible packaging. 	<ul style="list-style-type: none"> Clairol Color Crave launched a hair color packed into a squeeze tube. It also contains a sponge applicator which will allow quick and simple usage, without the consumer needing to touch the colorant. The product packaging appeals to consumers who prioritize easy-to-use formats.
Others	<ul style="list-style-type: none"> Other industries recorded a share of 13.3% in 2021, which is expected to decline and reach 12.7% in 2026, in terms of using flexible packaging. Within other industries, dog care products occupied the highest share in 2021. 	<ul style="list-style-type: none"> Flexible and resealable packaging is gaining popularity because it is more convenient for customers. Consumers looking for convenience in pet care products fueled the demand for high-quality flexible packaging. 	<ul style="list-style-type: none"> There was no noteworthy product launch in these industries.

Flexible Packaging – Growth Analysis by Pack Type and Pack Sub-Type

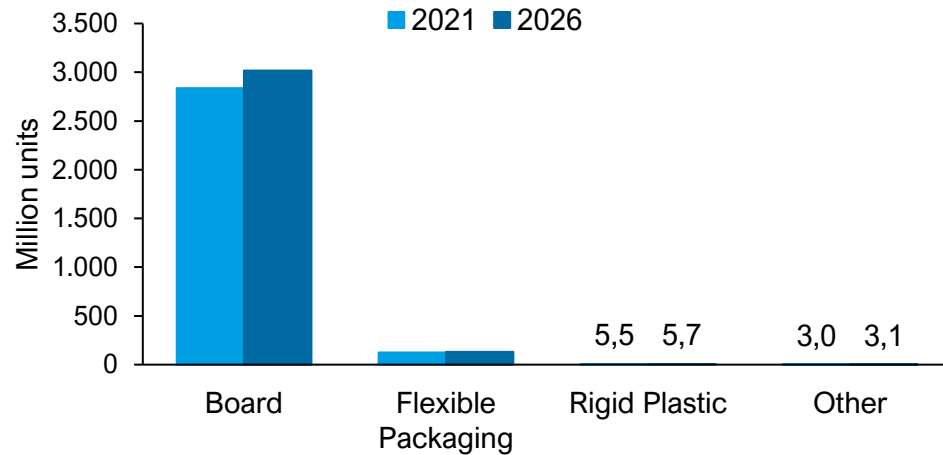


Flexible Packaging – Growth Analysis by Closure Material and Closure Type

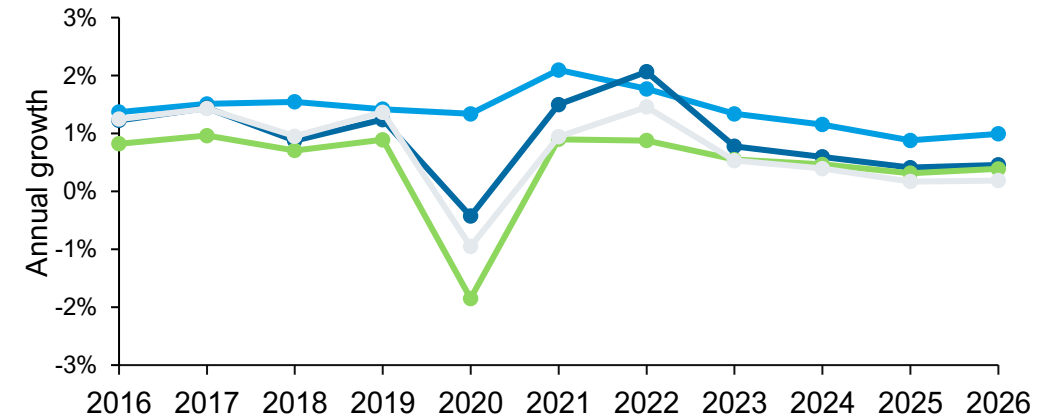


Flexible Packaging – Growth Analysis by Primary Outer Material and Type

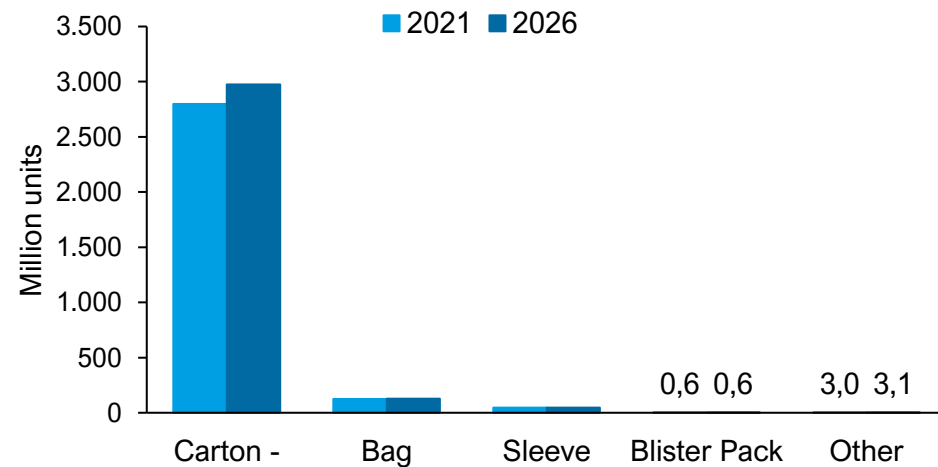
Primary Outer Material



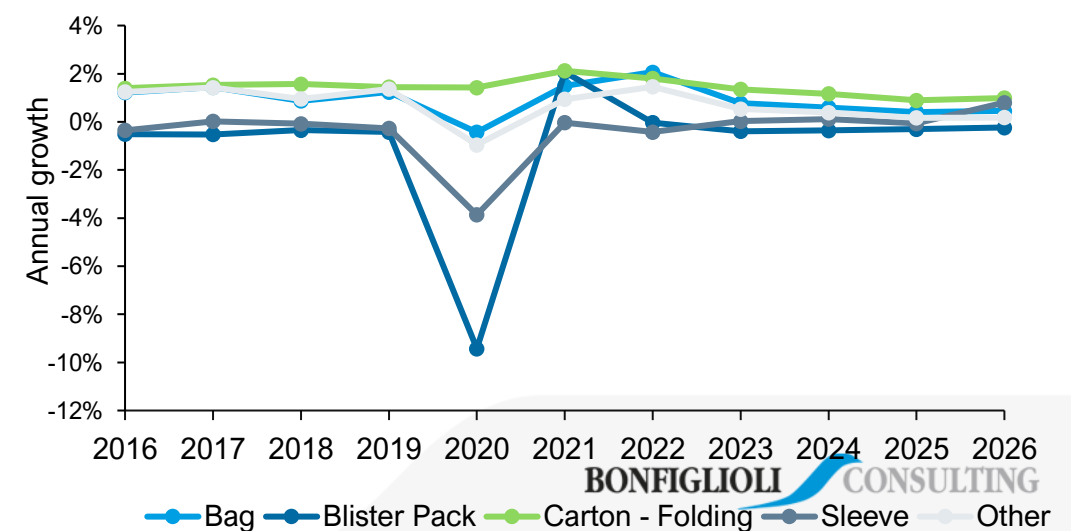
Annual growth rate by Primary Outer Material, 2016 – 26



Primary Outer Type



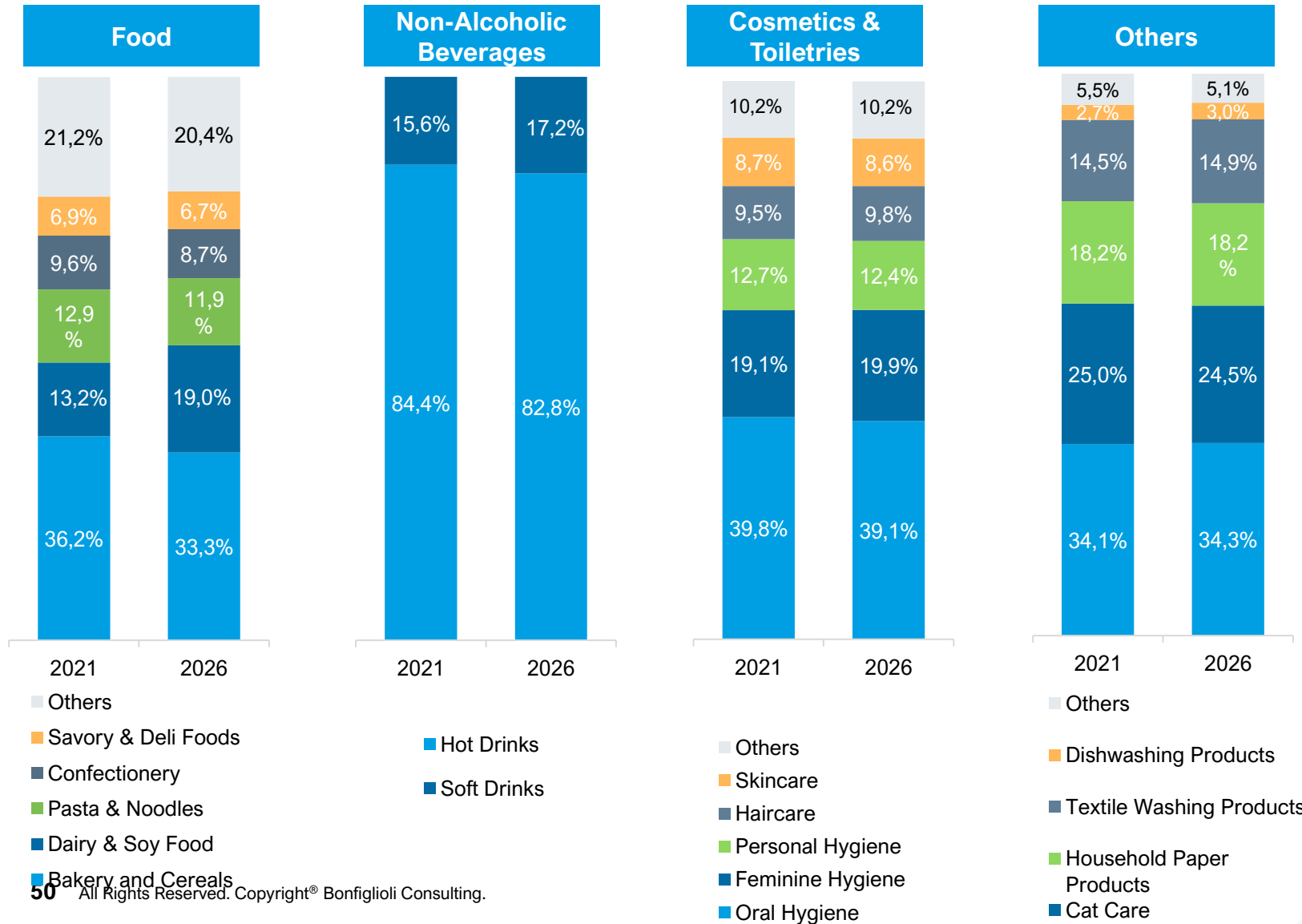
Annual growth rate by Primary Outer Type, 2016 – 26



Flexible Packaging – Volume Share by Industries and Sectors

		Industry volume (Million units)			Change in industry share, 2021–26 (PP)
Industry		2016	2021	2026	
Food		16,284.3	17,473.6	19,564.5	0.9
	Bakery and Cereals	5,869.7	6,318.8	6,520.2	-2.8
	Dairy & Soy Food	2,135.6	2,298.5	3,721.3	5.9
	Pasta & Noodles	2,210.5	2,260.9	2,329.2	-1.0
	Confectionery	1,662.5	1,676.0	1,707.8	-0.9
	Savory & Deli Foods	1,064.8	1,205.6	1,303.3	-0.2
	Others	3,341.1	3,713.8	3,982.7	-0.9
Non-Alcoholic Beverages		327.9	344.5	383.4	0.01
	Hot Drinks	258.0	290.7	317.6	-1.5
	Soft Drinks	69.9	53.8	65.8	1.5
Cosmetics & Toiletries		740.2	775.2	813.6	-0.2
	Oral Hygiene	290.7	308.5	318.1	-0.7
	Feminine Hygiene	137.5	148.4	161.7	0.7
	Personal Hygiene	90.0	98.6	100.6	-0.4
	Haircare	66.2	73.6	79.8	0.3
	Others	155.9	146.0	153.5	0.03
Others		2,705.2	2,864.6	3,010.7	-0.7
	Dog Care	922.8	976.6	1,031.7	0.2
	Cat Care	684.6	716.0	736.4	-0.5
	Household Paper Products	500.1	521.9	548.5	0.001
	Others	597.7	650.1	694.1	0.4

Flexible Packaging – Growth Analysis by Industries



Flexible packaging is extensively used in the food industry on account of its light weight, flexibility in design, portability, and convenience. In flexible packaging, food industry accounted for the highest volume share of 81.4% or 17.5 billion units in 2021.

Within the food industry, the bakery and cereals sector accounted for the highest share of 36.2% in 2021 for flexible packaging usage, followed by the dairy & soy food and pasta & noodles sectors, which held 13.2% and 12.9% shares, respectively.

Dairy & soy food sector will be the fastest-growing industry for flexible packs, with a CAGR of 10.1% during 2021–26.

Flexible Packaging – Innovative Packaging by Industry

Food

- Latteria Montello Spa launched Stracchino Nonno Nanni branded fresh, soft cheese, packed in a printed opaque barrier film flow-wrap, made with biodegradable, compostable bio-based film. The compostable format is overtly communicated to the consumer on the front of the pack, as it is positioned as all natural.



C&T

- Clairol Color Crave launched a hair color packed into a squeezable tube. It also contains a sponge applicator which will allow quick and simple usage, without the consumer needing to touch the colorant, which is an unusual format for hair color in Italy. The product packaging appeals to consumers who prioritize easy-to-use formats in their everyday purchases.



Analysis by Pack Material Glass



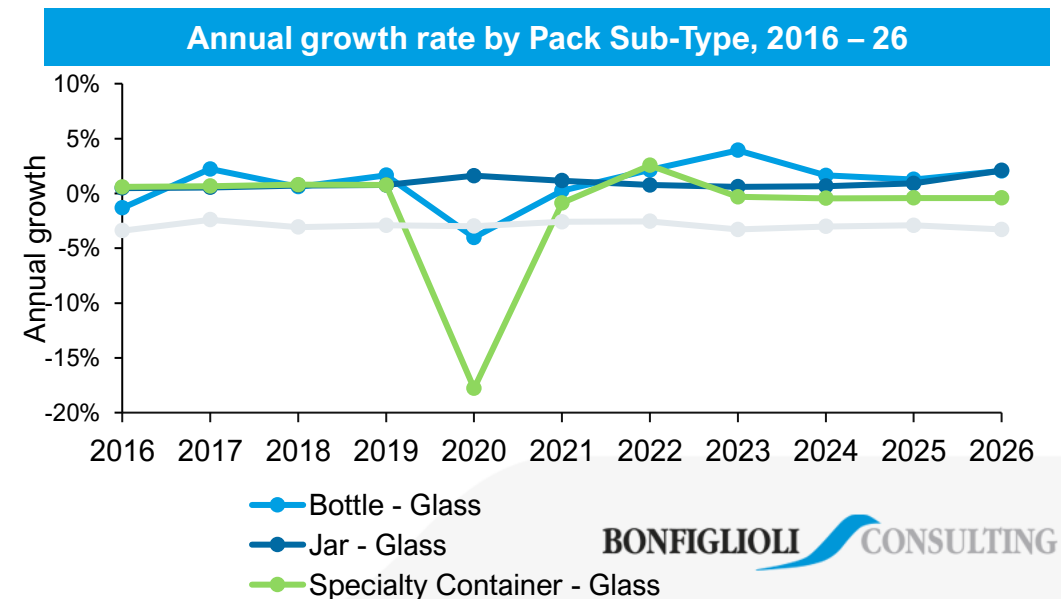
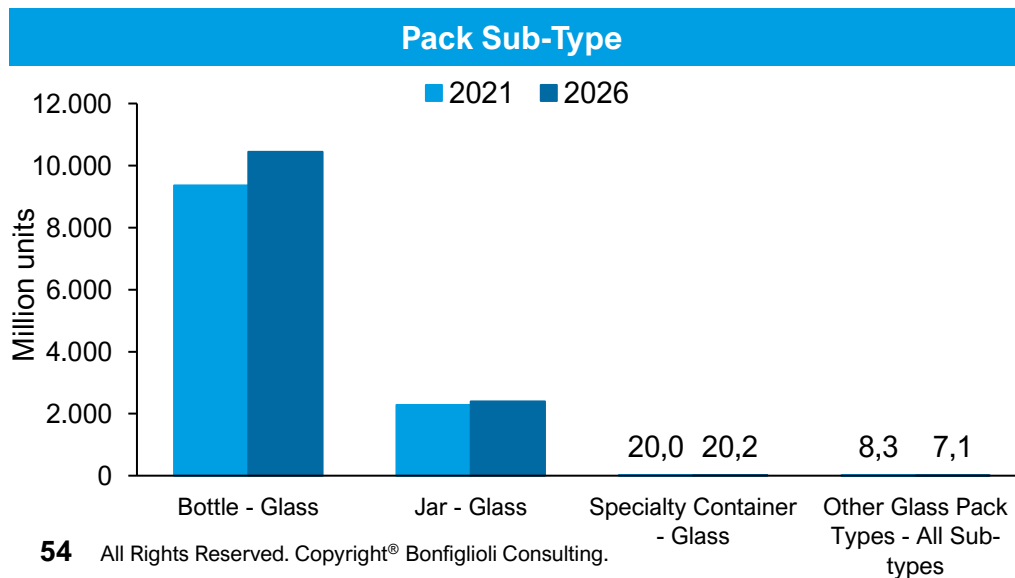
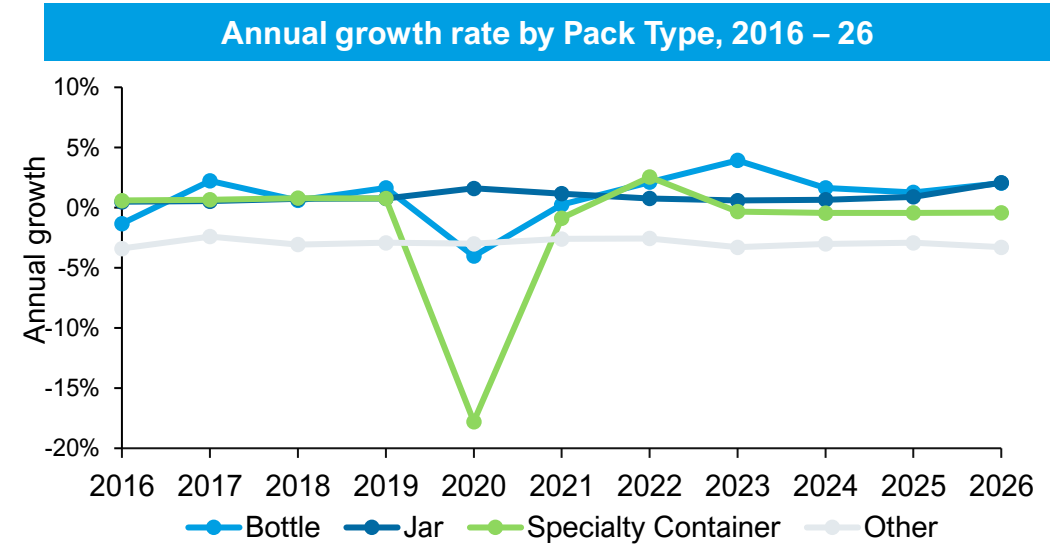
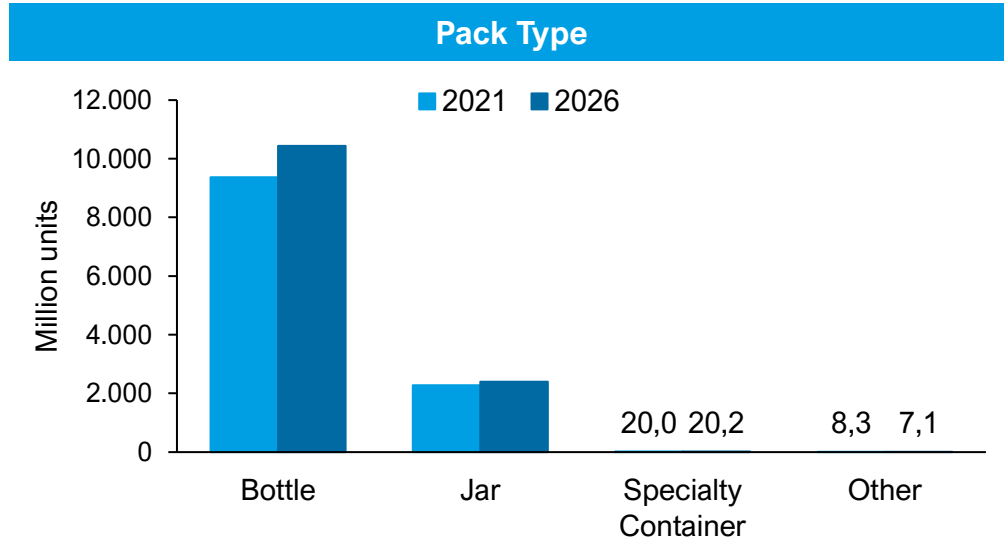
Source: GlobalData

Content Curation: Knowledge Office Bonfiglioli Consulting

Glass by Industries – Key Takeaways

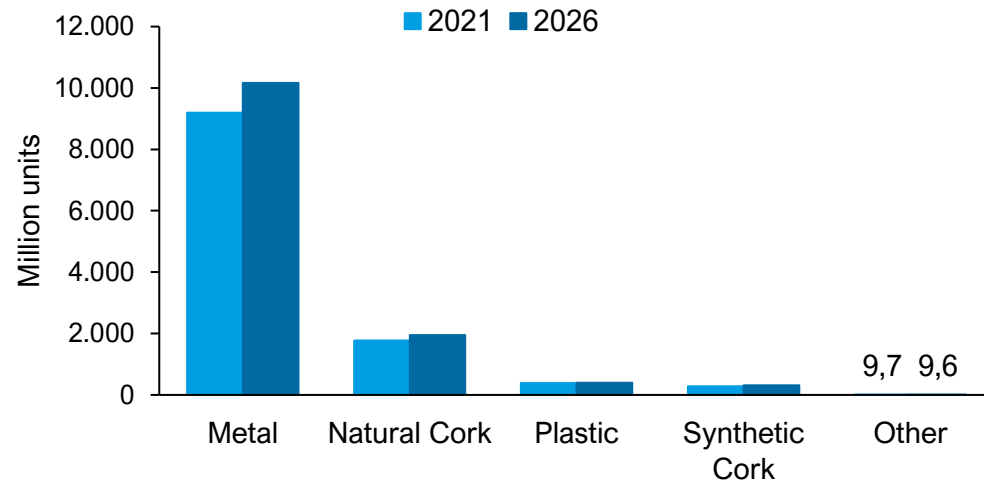
	Market overview	Key drivers	New product launches
Alcoholic	<ul style="list-style-type: none"> Alcoholic beverages is the most prominent industry in terms of using glass, with a share of 47.4% in 2021 and is expected to reach 47.5% in 2026. Within the alcoholic beverages industry, beer & cider occupied a share of 54.5% in 2021. 	<ul style="list-style-type: none"> Glass bottles are mostly used for alcoholic beverages as they are made from recyclable, sustainable and non-permeable materials. Usage of glass in the spirits sector is forecast to register a CAGR of 3.1% during 2021–26. 	<ul style="list-style-type: none"> Beer Pro Distribution d.o.o., launched a new O'Hara's branded Tropical IPA Beer which is claimed to contain ingredients such as tangerine, papaya, citrus and mango with a creamy mouthfeel. The product is available in a 500ml glass bottle and features 7.2% ABV.
Food	<ul style="list-style-type: none"> Food industry, in terms of using glass packaging, recorded a share of 27.2% in 2021 and is expected to decline and reach 25.5% in 2026. Within the food industry, seasonings, dressings & sauces sector occupied a share of 56.6% in 2021. 	<ul style="list-style-type: none"> Glass packaging in the food industry is expected to grow with high demand from sectors, such as fruit and vegetables and syrups & spreads through 2026. 	<ul style="list-style-type: none"> Develey Italia Srl launched a dressing in a lime soy variety. The product is available in a 230ml modern-looking glass bottle with eye-catching visuals, reflecting the product premiumness and making it have a noticeable shelf presence.
Non-Alcoholic	<ul style="list-style-type: none"> Non-alcoholic beverages industry using glass accounted for a share of 24.8% in 2021 and is expected to decline and reach 25.9% in 2026. Within non-alcoholic beverages, soft drinks sector accounted for the majority share in 2021. 	<ul style="list-style-type: none"> Usage of glass in the soft drinks sector is forecast to register a CAGR of 2.9% during 2021–26. 	<ul style="list-style-type: none"> Sanpellegrino S.p.A. introduced a new Sambuco variety of Sanbitter branded non-alcoholic beverage. The product is available in 4x20cl oversleeved glass bottles which showcase the cream-colored soft drink, increasing curiosity among experiential consumers.
C&T	<ul style="list-style-type: none"> Cosmetics & toiletries industry in terms of using glass, recorded a share of 0.6% in 2021 and is expected to drop to 0.5% in 2026. Within cosmetics & toiletries, the make-up sector accounted for the highest share in 2021. 	<ul style="list-style-type: none"> The personal hygiene sector is expected to drive the most growth in this packaging material. The use of glass packaging is motivated by the premium image it provides, as well as its heat-resistant property, which aids in increasing the product's shelf life. 	<ul style="list-style-type: none"> There was no noteworthy product launch in these industries.

Glass – Growth Analysis by Pack Type and Pack Sub-Type

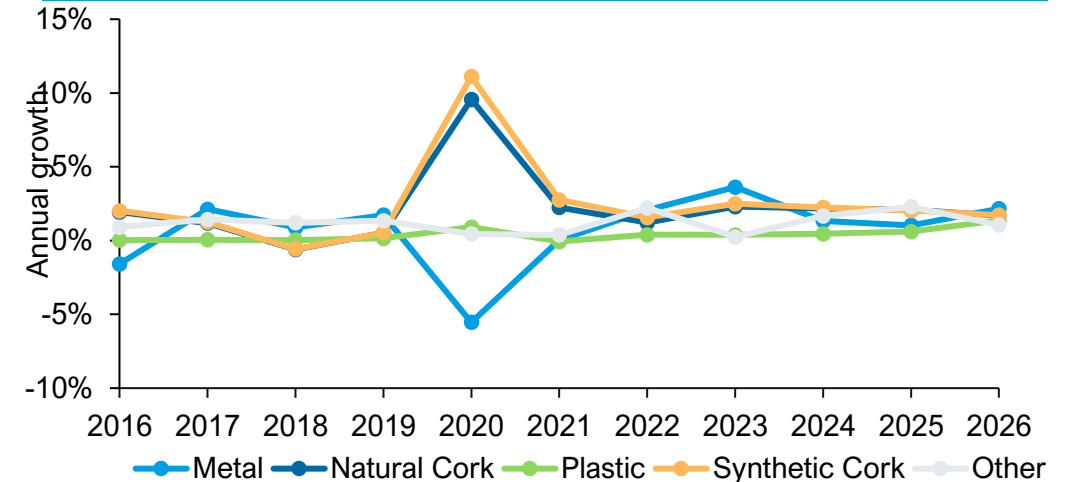


Glass – Growth Analysis by Closure Material and Closure Type

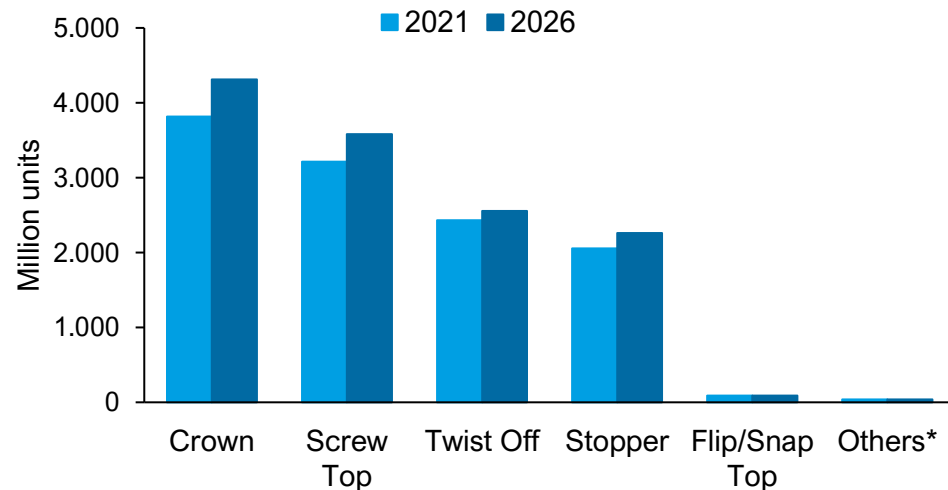
Closure Material



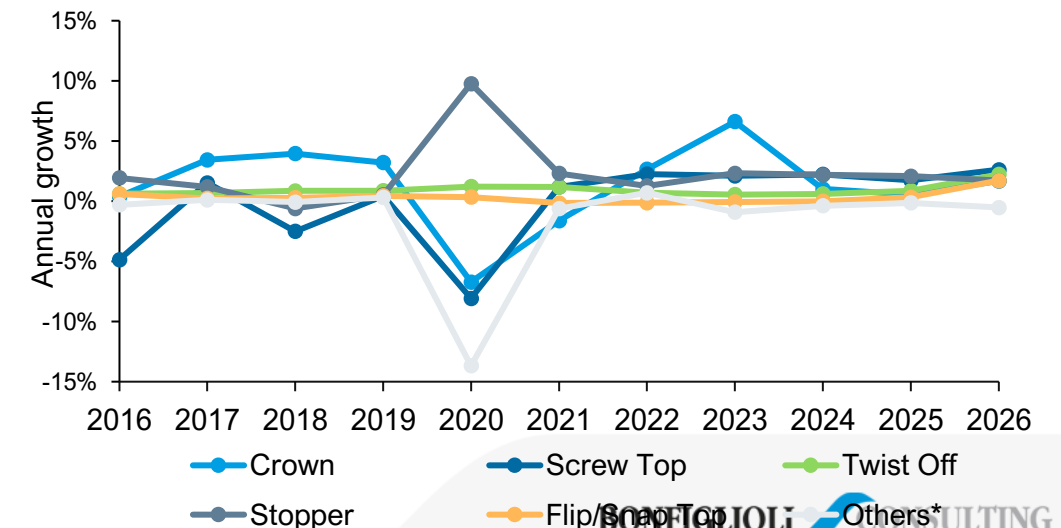
Annual growth rate by Closure Material, 2016 – 26



Closure Type

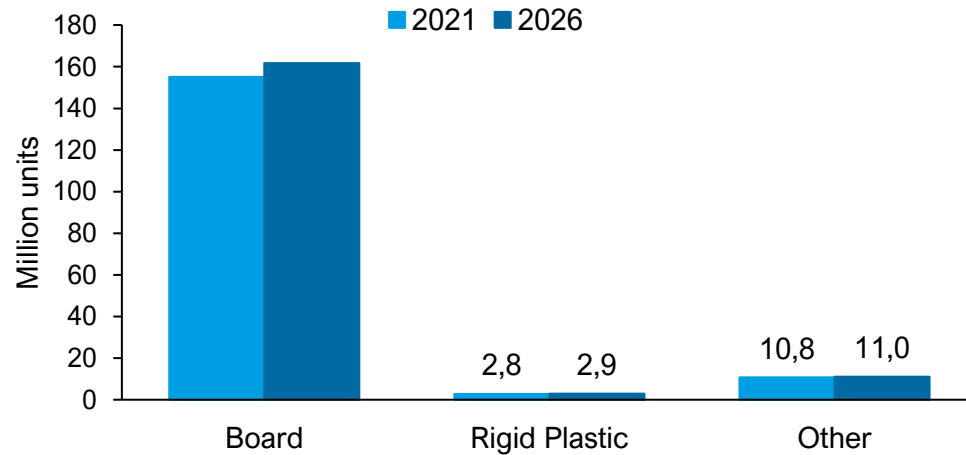


Annual growth rate by Closure Type, 2016 – 26

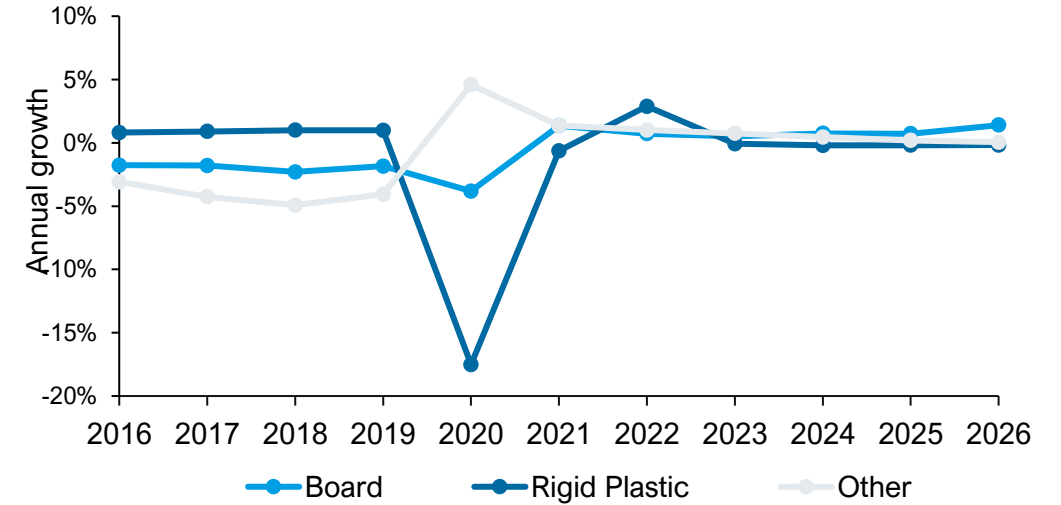


Glass – Growth Analysis by Primary Outer Material and Type

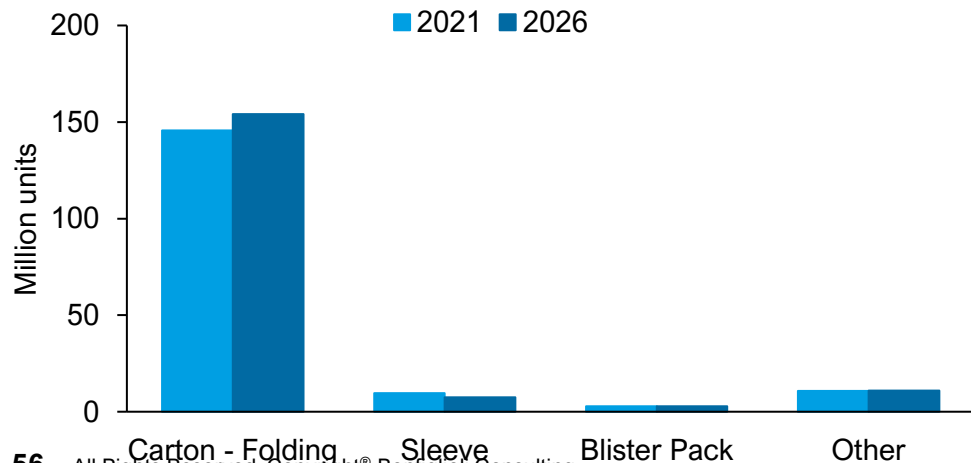
Primary Outer Material



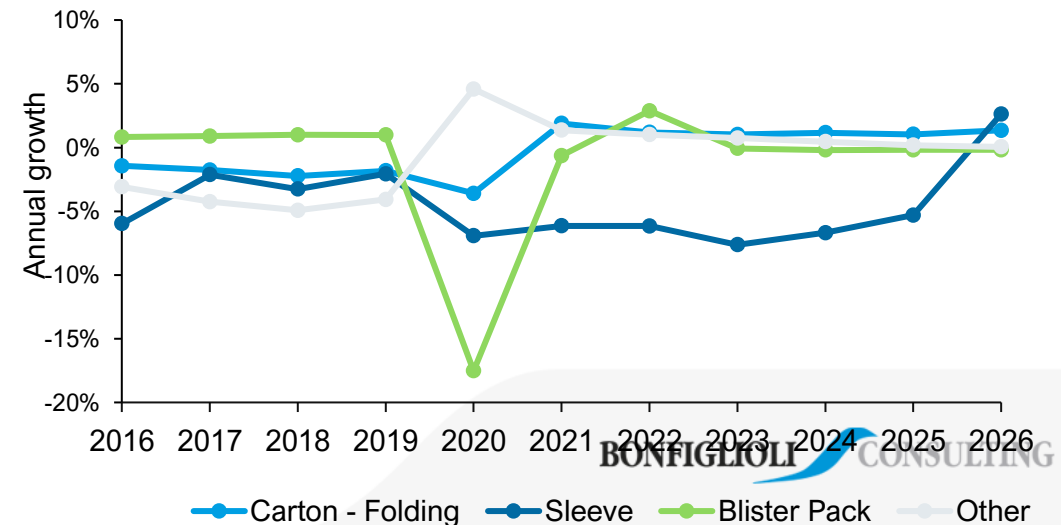
Annual growth rate by Primary Outer Material, 2016 – 26



Primary Outer Type



Annual growth rate by Primary Outer Type, 2016 – 26

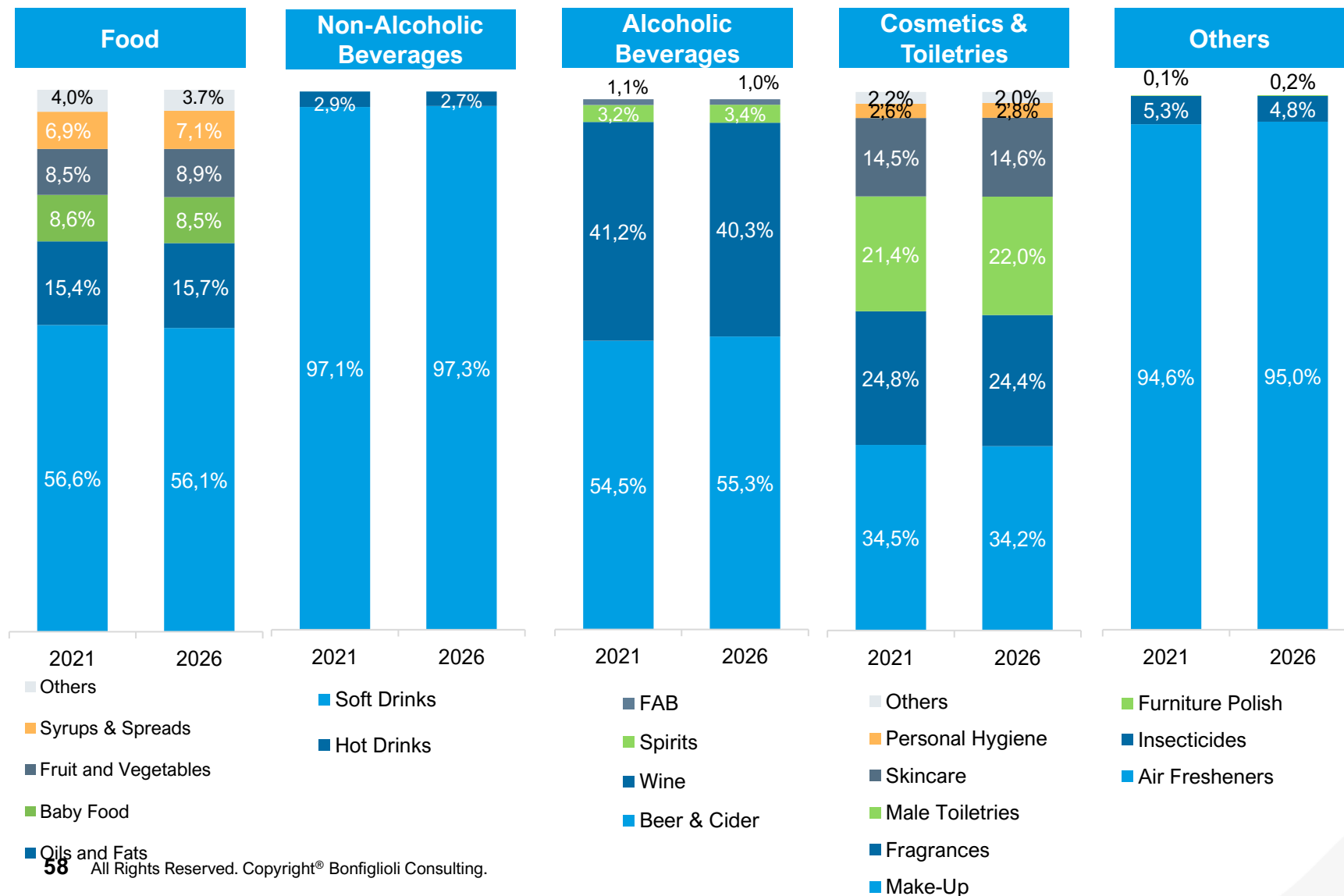


Glass – Volume Share by Industries and Sectors

Industry volume (Million units)

Industry	2016	2021	2026	Change in industry share, 2021–26 (PP)
Food	3,010.7	3,174.9	3,334.5	-1.3
Seasonings, Dressings & Sauces	1,720.7	1,797.4	1,869.0	-0.6
Oils and Fats	437.0	489.7	522.2	0.2
Baby Food	285.2	272.4	282.7	-0.1
Fruit and Vegetables	232.6	269.5	296.5	0.4
Syrups & Spreads	208.9	217.5	235.1	0.2
Others	126.2	128.4	128.9	-0.2
Non-Alcoholic Beverages	3,247.3	2,893.6	3,339.7	1.2
Soft Drinks	3,172.3	2,810.2	3,249.7	0.2
Hot Drinks	75.0	83.5	90.0	-0.2
Cosmetics & Toiletries	76.4	64.9	65.5	-0.05
Make-Up	26.9	22.3	22.4	-0.2
Fragrances	21.3	16.1	16.0	-0.4
Male Toiletries	15.4	13.9	14.4	0.6
Skincare	9.7	9.4	9.6	0.1
Personal Hygiene	1.6	1.7	1.8	0.1
Haircare	1.0	0.9	0.8	-0.2
Oral Hygiene	0.5	0.5	0.5	-0.01
Suncare	0.10	0.08	0.08	0.004
Others	11.1	12.4	13.6	0.00004
Air Fresheners	10.4	11.7	13.0	0.5
Insecticides	0.7	0.6	0.7	-0.4
Furniture Polish	0.02	0.02	0.02	-0.01

Glass – Growth Analysis by Industries



Glass is extensively used in the alcoholic beverages industry due to its strength, durability, and impermeability to oxidation. This packaging material accounted for 47.4% share in 2021. This pack material protects the beverages from light and keeps it intact in terms of product freshness, taste, and flavor.

Within alcoholic beverages, the beer & cider sector accounted for the highest share of 54.5% in 2021 for glass packaging usage, while the spirits sector is expected to grow the fastest at a CAGR of 3.1% during 2021–26.

Non-alcoholic beverages will be the fastest growing end-user industry for glass packs, with a CAGR of 2.9% during 2021–26.

Glass- Innovative packaging by industry

Food

- Develey Italia Srl launched a dressing in a lime soy variety. The product is available in a 230ml modern-looking glass bottle with eye-catching visuals, reflecting the product premiumness and making it have a noticeable shelf presence.



Alcoholic

- Beer Pro Distribution d.o.o., launched a new O'Hara's branded Tropical IPA Beer which is claimed to contain ingredients such as tangerine, papaya, citrus and mango with a creamy mouthfeel. The product is available in a 500ml glass bottle and features 7.2% ABV.



Non-Alcoholic

- Sanpellegrino S.p.A. introduced a new Sambuco variety of Sanbitter branded non-alcoholic beverage that delivers an unusual flavor in carbonated mixers category. The product goes in line with consumers growing demand for unique sensory experience. The product is available in 4x20cl oversleeved glass bottles which showcase the cream-colored soft drink, increasing curiosity among experiential consumers.



Appendix

Source: GlobalData
Content Curation: Knowledge Office Bonfiglioli Consulting



Market size

Market size by pack material, 2016 – 26, million units

Material	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Rigid Plastics	27,645.6	28,502.3	28,746.5	29,125.0	28,188.6	28,612.4	29,128.1	29,740.7	30,468.3	31,091.6	32,001.4
Rigid Metal	5,906.6	5,930.5	5,928.7	6,024.1	5,886.7	5,971.2	6,077.4	6,206.7	6,291.3	6,337.4	6,441.5
Paper & Board	11,439.2	11,255.1	11,121.9	11,015.8	10,843.7	10,818.9	10,893.4	10,835.6	10,920.2	10,999.4	11,121.1
Flexible Packaging	20,057.6	20,285.5	20,525.6	20,758.8	21,196.6	21,458.0	21,703.6	22,025.1	22,503.7	23,035.6	23,772.2
Glass	11,517.3	11,736.5	11,810.2	11,985.1	11,624.2	11,673.1	11,890.3	12,280.0	12,458.3	12,607.4	12,865.1
Total	76,566.2	77,709.8	78,133.0	78,908.9	77,739.8	78,533.6	79,692.8	81,088.0	82,641.8	84,071.4	86,201.3

Market size

Market size of rigid plastics by industry, 2016 – 26, million units

Industry	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Food	14,600.9	14,833.7	15,102.5	15,345.3	15,656.4	15,821.4	15,955.0	16,228.1	16,620.2	17,034.4	17,571.5
Non-Alcoholic Beverages	10,614.4	11,223.6	11,187.9	11,313.3	10,012.9	10,215.0	10,568.6	1,0879.3	11,192.0	11,378.7	11,722.4
Alcoholic Beverages	35.2	36.5	38.2	38.3	40.7	38.2	37.8	39.4	38.4	37.4	36.7
Cosmetics & Toiletries	942.1	945.5	951.2	955.3	919.2	945.2	954.4	959.5	962.3	964.7	975.4
Others	1,453.1	1,463.0	14,66.8	1,472.8	1,559.4	1,592.6	1,612.3	1,634.3	1,655.4	1,676.4	1,695.4
Total	27,645.6	28,502.3	28,746.5	29,125.0	28,188.6	28,612.4	29,128.1	29,740.7	30,468.3	31,091.6	32,001.4

Market size of rigid metal by industry, 2016 – 26, million units

Industry	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Food	2,534.8	2,593.0	2,652.8	2,712.2	2,759.1	2,840.7	2,876.6	2,922.6	29,64.7	3,002.1	3,077.5
Non-Alcoholic Beverages	1,530.3	1,491.0	1,434.8	1,455.3	1,298.4	1,321.3	1,379.8	1,436.3	1,483.3	1,497.9	1,548.3
Alcoholic Beverages	651.9	662.1	668.8	689.2	655.4	633.8	656.7	686.5	686.4	683.8	664.7
Cosmetics & Toiletries	86.1	86.3	86.7	87.0	83.5	86.2	87.1	87.4	87.7	87.8	89.4
Others	1,103.5	1,098.0	1,085.6	1,080.5	1,090.3	1,089.3	1,077.2	1,073.8	1,069.1	1,065.8	1,061.5
Total	5,906.6	5,930.5	5,928.7	6,024.1	5,886.7	5,971.2	6,077.4	6,206.7	6,291.3	6,337.4	6,441.5

Market size

Market size of paper & board by industry, 2016 – 26, million units

Industry	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Food	5,137.7	5,115.2	5,088.2	5,069.2	5,149.7	5,204.4	5,298.5	5,411.3	5,493.0	5,554.3	5,622.9
Non-Alcoholic Beverages	1,519.9	1,501.8	1,443.6	1,421.3	1,290.8	1,262.7	1,317.1	1,380.9	1,443.5	1,505.4	1,574.9
Alcoholic Beverages	620.3	626.7	621.8	624.0	660.0	653.5	642.0	646.4	645.2	647.9	650.4
Cosmetics & Toiletries	109.7	109.6	110.0	110.1	103.1	104.0	104.9	106.0	106.2	106.4	106.7
Others	4,051.6	3,901.8	3,858.3	3,791.3	3,640.0	3,594.3	3,530.9	3,290.9	3,232.4	3,185.3	3,166.2
Total	11,439.2	11,255.1	11,121.9	11,015.8	10,843.7	10,818.9	10,893.4	10,835.6	10,920.2	10,999.4	11,121.1

Market size of flexible packaging by industry, 2016 – 26, million units

Industry	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Food	16,284.3	16,499.9	16,737.2	16,957.5	17,279.0	17,473.6	17,677.5	17,950.2	18,384.5	18,873.6	19,564.5
Non-Alcoholic Beverages	327.9	327.4	320.1	319.3	345.4	344.5	352.8	362.1	368.6	375.2	383.4
Cosmetics & Toiletries	740.2	746.1	752.6	758.9	748.6	775.2	785.3	792.0	798.6	804.3	813.6
Others	2,705.2	2,712.1	2,715.8	2,723.2	2,823.6	2,864.6	2,888.0	2,920.8	2,951.9	2,982.5	3,010.7
Total	20,057.6	20,285.5	20,525.6	20,758.8	21,196.6	21,458.0	21,703.6	22,025.1	22,503.7	23,035.6	23,772.2

Market size

Market size of glass by industry, 2016 – 26, million units

Industry	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Food	3,010.7	3,034.9	3,064.1	3,095.2	3,138.9	3,174.9	3,195.5	3,213.4	3,233.1	3,260.1	3,334.5
Non-Alcoholic Beverages	3,247.3	3,315.6	3,269.9	3,279.5	2,855.5	2,893.6	2,996.4	3,086.2	3,182.2	3,241.6	3,339.7
Alcoholic Beverages	5,171.7	5,298.0	5,387.6	5,521.0	5,552.9	5,527.4	5,620.0	5,901.9	5,964.2	6,026.7	6,111.8
Cosmetics & Toiletries	76.4	76.8	77.2	77.7	64.7	64.9	65.7	65.6	65.6	65.5	65.5
Others	11.1	11.3	11.4	11.5	12.1	12.4	12.7	12.9	13.2	13.4	13.6
Total	11,517.3	11,736.5	11,810.2	11,985.1	11,624.2	11,673.1	11,890.3	12,280.0	12,458.3	12,607.4	12,865.1

Market size

Market size of Paper & board by industry, 2016 – 2026, billion units

Industry	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Food	29.8	29.9	30.0	30.0	29.3	30.7	31.1	31.6	32.0	32.4	32.8
Non - Alcoholic Beverages	4.7	4.6	4.5	4.4	4.5	4.5	4.5	4.5	4.5	4.5	4.5
Alcoholic Beverages	4.1	4.6	5.0	5.3	1.8	2.4	3.2	3.4	3.6	3.8	4.1
Cosmetics & Toiletries	0.3	0.3	0.3	0.3	0.3	0.4	0.4	0.4	0.4	0.4	0.4
Others	15.3	14.9	14.6	14.2	13.0	12.7	12.5	12.3	12.1	11.9	11.8
Total	54.2	54.3	54.5	54.3	48.9	50.6	51.6	52.1	52.5	53.0	53.6

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