



Web Packaging Solutions
TRUSTED PARTNERS FOR FLEXIBLE PACKAGING



WPS INSIGHT

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April reflects an industry that is still growing, but under increasing structural pressure. Flexible packaging continues to expand, supported by innovation and strong demand, even as consolidation rises and cost exposure remains concentrated in key inputs such as films, paper, and resins.

At the same time, prolonged disruption across energy, logistics, and raw materials is reshaping how packaging decisions are made. Companies are moving beyond efficiency toward resilience, with greater focus on supplier diversification, material flexibility, and tighter alignment between procurement and packaging design.

This shift is also accelerating format change. Functional innovations and material efficiency are enabling flexible packaging to replace rigid formats in more applications. In parallel, circular packaging is being repositioned. It is no longer driven only by sustainability goals, but by its ability to reduce dependence on volatile virgin material supply chains and improve supply security.

The direction is clear. Packaging is increasingly defined by how well it can operate within a constrained, uncertain, and interconnected global system.

EXECUTIVE TAKEAWAYS

◆ Growth continues, but structural pressure is rising

Flexible packaging is expanding steadily, but consolidation, trade imbalances, and concentrated input costs are increasing complexity and competitive intensity.

◆ Resilience is replacing efficiency as the core operating model

Persistent disruption across energy, logistics, and materials is forcing companies to redesign procurement, sourcing, and packaging strategies around risk management.

◆ Format innovation is accelerating the shift to flexible packaging

Functional improvements and material efficiency are enabling flexible formats to displace rigid packaging in more use cases.

◆ Circularity is becoming a supply chain strategy, not just a sustainability goal

Circular packaging models are gaining importance as a way to reduce dependence on volatile virgin material supply chains and improve long-term resilience.



Industry Growth Masks Rising Structural Complexity

WHY IT MATTERS

The flexible packaging industry is expanding, but underlying shifts in cost structure, trade dynamics, and consolidation are redefining how value is created and sustained.

EXECUTIVE TAKEAWAYS

- U.S. flexible packaging industry reached \$42.6 billion in 2024, showing continued growth
- Expected to grow further to \$44.6 billion in 2025
- Value-added segment represents a significant portion of industry value
- Flexible packaging accounts for about 20% of the total packaging market
- Food remains the dominant end-use segment
- Material costs are heavily concentrated in films, paper, and resins
- Mergers and acquisitions increased, indicating consolidation
- Trade deficit widened, with imports exceeding exports
- Labor shortages remain a key operational challenge

LESSONS & ACTIONABLES

Growth alone is not a differentiator. Managing cost concentration, scale, and structural shifts will define competitiveness.



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Prolonged Disruption Reshapes Packaging Strategy

WHY IT MATTERS

Disruption is no longer episodic. It is systemic, forcing companies to rethink packaging decisions across materials, sourcing, and supply chains.

EXECUTIVE TAKEAWAYS

- Industry faces ongoing pressure from energy volatility, freight costs, and raw material price swings
- Disruption affects all major packaging materials including plastics, metals, glass, and paper
- Key global trade routes and energy flows remain critical risk points
- Material pricing has become more volatile and interconnected
- Polymer markets are experiencing instability and shifting dynamics
- Companies are diversifying suppliers and regionalizing sourcing
- Packaging design is becoming more flexible and simplified
- Inventory strategies and planning cycles are being extended
- Procurement is shifting from efficiency-driven to resilience-focused models
- Risk mapping and supply chain visibility are becoming essential capabilities

LESSONS & ACTIONABLES

Resilient packaging systems require integrated decisions across sourcing, materials, and design.

Functional Innovation Accelerates Shift to Flexible Formats

WHY IT MATTERS

Packaging innovation is driven by usability and material efficiency, enabling flexible formats to compete more effectively with rigid alternatives.

EXECUTIVE TAKEAWAYS

- Collaboration introduced controlled dispensing technology in spouted pouches
- Self-sealing valve system improves cleanliness and reduces spillage
- Uses nanolayer coextrusion to stack hundreds to thousands of layers
- Compatible across multiple closure formats and pouch designs
- Designed for low-viscosity beverages such as juices and ready-to-drink beverages
- Flexible pouches can reduce material usage significantly compared to rigid bottles
- Lightweight and portable formats support on-the-go consumption
- Components meet food safety and regulatory requirements
- Enhances user experience while supporting material reduction

LESSONS & ACTIONABLES

User-driven functionality combined with material efficiency is accelerating format substitution.

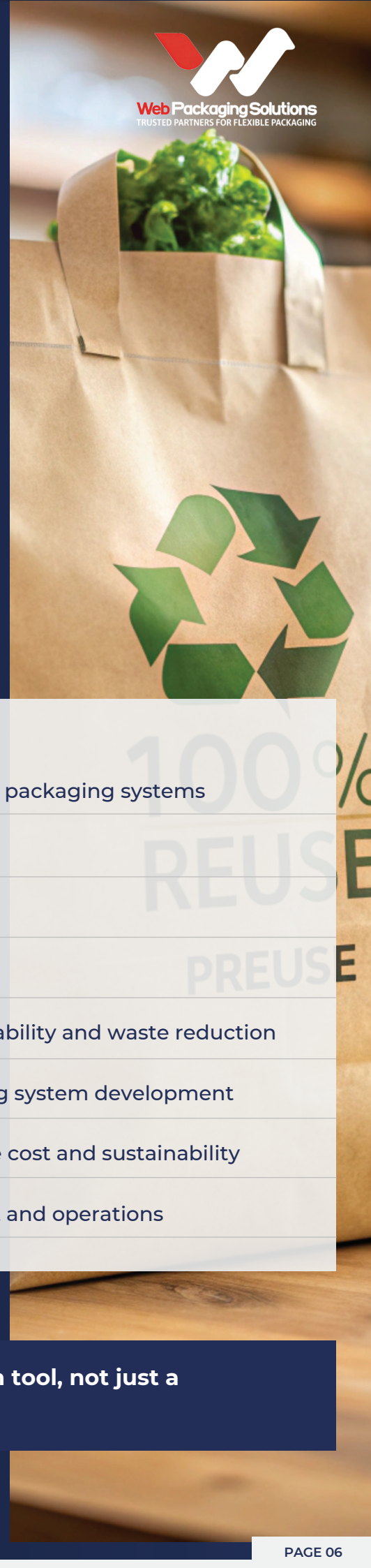


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Circular Packaging Becomes a Core Business Strategy

WHY IT MATTERS

Circularity is evolving from a sustainability initiative into a strategic lever for managing supply risk and reducing dependence on global material flows.



EXECUTIVE TAKEAWAYS

- Geopolitical disruptions are exposing vulnerabilities in linear packaging systems
- Circular models reduce reliance on virgin raw materials
- Reuse, refill, and recycling systems are gaining importance
- Localized material flows improve supply chain stability
- Regulatory pressure is increasing through policies on recyclability and waste reduction
- Extended producer responsibility frameworks are supporting system development
- Packaging decisions now consider supply security alongside cost and sustainability
- Circular systems are becoming integrated into procurement and operations

LESSONS & ACTIONABLES

Circular packaging should be designed as a risk mitigation tool, not just a sustainability initiative.



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