

Post-Industrial Recyclate (PIR) Flexible Packaging Market to Hit \$2.45B by 2033 Amid Green Push - SRI

Global PIR flexible packaging market to reach \$2.45B by 2033, driven by sustainability goals and circular economy adoption across industries

LONDON, UNITED KINGDOM, UNITED KINGDOM, February 9, 2026 /EINPresswire.com/ --

London, United Kingdom, February 2026 - The [Post-Industrial Recyclate \(PIR\) Flexible Packaging Market](#) is undergoing a steady and structurally important transformation as sustainability becomes a core priority across global packaging value chains. According to a newly published study by Strategic Revenue Insights, the global market was valued at USD 1,376.7 million in 2024 and is forecast to reach USD 2,454.0 million by 2033, expanding at a compound annual growth rate of 7.5 percent during the forecast period from 2025 to 2033.

With tightening regulations and consumer pressure, PIR is no longer optional. It is the most viable path for manufacturers to close the production loop while maintaining packaging integrity."

*Strategic Revenue Insights
(SRI)*

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This growth reflects a broader shift in how packaging materials are sourced, processed, and deployed across industries. Manufacturers, brand owners, and regulators are increasingly prioritizing waste reduction, recycled content integration, and circular economy alignment. Post-industrial recyclate flexible packaging, derived from manufacturing and industrial plastic waste, is emerging as a reliable and scalable alternative to virgin plastic materials.

As regulatory pressure intensifies and consumer expectations evolve, PIR flexible packaging is transitioning from a sustainability initiative to a strategic material choice across food and beverage, healthcare, personal care, and industrial packaging applications.

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Post-Industrial Recyclate (PIR) Flexible Packaging Market

The market's expansion is closely tied to the global push for sustainable packaging solutions. Governments and regulatory bodies are implementing stricter rules around plastic waste management, recycled content mandates, and environmental reporting. At the same time, multinational brands are embedding sustainability into product design and packaging strategies to meet corporate ESG commitments and maintain competitiveness in increasingly conscious consumer markets.

Post-industrial recyclate offers distinct advantages over post-consumer recyclate, including higher material consistency, improved traceability, and lower contamination risks. These characteristics make PIR materials particularly suitable for flexible packaging applications that demand predictable performance, reliable quality, and operational efficiency.

The adoption of PIR flexible packaging supports circular economy models by diverting industrial plastic waste away from landfills and reintegrating it into manufacturing cycles. This closed-loop approach not only reduces environmental impact but also improves material efficiency and long-term cost stability for packaging producers.

Technological advancements in recycling infrastructure are playing a critical role in enabling market growth. Innovations in sorting, washing, compounding, and extrusion technologies are significantly improving the quality of recycled materials. Modern recycling systems are now capable of producing PIR materials with enhanced mechanical strength, improved barrier properties, and better aesthetic consistency.

These developments are reducing the historical performance gap between recycled and virgin plastics. As a result, PIR flexible packaging is being adopted across a broader range of use cases, including applications that were previously dominated by virgin materials due to quality or regulatory constraints.

Investment in recycling capacity and closed-loop systems is also increasing across major packaging markets. Large packaging manufacturers and material suppliers are strengthening vertical integration to secure consistent access to high-quality PIR feedstock. This trend is improving supply reliability and enabling long-term adoption at scale.

Regulatory frameworks are further accelerating the adoption of PIR flexible packaging. Policies promoting recycled content, extended producer responsibility, and waste reduction targets are reshaping packaging material selection across regions. In Europe and North America, packaging waste directives and sustainability reporting requirements are compelling companies to shift away from virgin plastics.

Emerging economies across Asia Pacific are also strengthening regulatory oversight around plastic waste and recycling. Government initiatives promoting sustainable materials, combined with rapid industrial growth, are creating new opportunities for PIR flexible packaging adoption in high-growth markets.

Among application segments, the food and beverage industry represents the largest share of the [Post-Industrial Recyclate Flexible Packaging Market](#). Consumer demand for environmentally responsible packaging, combined with regulatory pressure on packaging waste, is driving increased use of PIR materials across flexible packaging formats such as pouches, wraps, and secondary packaging.

While regulatory compliance for food contact materials remains a key consideration, advancements in recycling quality and material processing are expanding the suitability of PIR materials within food and beverage applications. Brands are increasingly using PIR flexible packaging to demonstrate sustainability leadership while maintaining product integrity and shelf life performance.

The healthcare and personal care sectors are also contributing to market growth. These industries are adopting PIR flexible packaging as part of broader sustainability initiatives, particularly in non-critical and secondary packaging applications. The industrial sector is similarly increasing adoption, driven by waste reduction goals and material efficiency benefits.

By material type, polyethylene dominates the [PIR flexible packaging market](#) due to its versatility, recyclability, and cost efficiency. Polyethylene is widely used across food and beverage, healthcare, and personal care packaging applications, supported by its favorable barrier properties and processing flexibility.

Polypropylene represents another significant material segment, particularly in industrial and consumer packaging applications that require higher durability and resistance. Polyethylene terephthalate is gaining momentum due to its excellent barrier performance and suitability for moisture and oxygen-sensitive products. Other polymers are used in niche applications where specific performance characteristics are required.

From an end-user perspective, manufacturers account for the largest share of market demand. Packaging converters and brand owners are increasingly incorporating PIR materials into their product portfolios to meet sustainability targets and reduce dependency on virgin plastics. Retailers are also playing a growing role as private-label sustainability initiatives gain traction.

Consumer awareness is reinforcing these trends, with increasing preference for products packaged using recycled and environmentally responsible materials. This demand-side pressure is encouraging wider adoption of PIR flexible packaging across multiple retail categories.

Regionally, North America remains one of the leading markets for PIR flexible packaging. Strong consumer awareness, supportive policy frameworks, and advanced recycling infrastructure are driving steady growth across the region. The United States represents a significant share of global demand, supported by the presence of major packaging manufacturers and ongoing investment in recycling technologies.

Europe continues to demonstrate strong market performance, driven by stringent packaging waste regulations and a well-established circular economy ecosystem. Countries such as Germany and the United Kingdom are at the forefront of sustainable packaging adoption, supported by robust recycling systems and regulatory enforcement.

Asia Pacific is expected to witness the fastest growth over the forecast period. Rapid industrialization, expanding consumer markets, and increasing government focus on sustainability are driving adoption across China, India, and other emerging economies. Investments in recycling infrastructure and policy reforms are further strengthening the regional market outlook.

Latin America and the Middle East and Africa are emerging markets with growing potential. Increasing awareness of environmental issues and gradual improvements in recycling capabilities are creating opportunities for market expansion across these regions.

The competitive landscape of the Post-Industrial Recyclate Flexible Packaging Market is defined

by innovation, capacity expansion, and strategic collaboration. Leading companies are investing in research and development to improve recyclate quality, expand product offerings, and enhance sustainability credentials.

Key players including Amcor plc, Berry Global Inc., Sealed Air Corporation, Mondi Group, and DS Smith Plc are strengthening their market positions through technology investments, partnerships, and recycling infrastructure development. These companies are leveraging scale and expertise to meet evolving customer and regulatory requirements.

Despite strong growth prospects, the market faces challenges related to high recycling costs, regulatory complexity, and infrastructure limitations in certain regions. Compliance with food safety standards and material certification requirements can increase operational complexity and investment requirements.

However, continued innovation, economies of scale, and increasing collaboration across the packaging value chain are expected to mitigate these challenges over time. As recycled material quality improves and regulatory clarity increases, barriers to adoption are likely to decline.

Looking ahead, the Post-Industrial Recyclate Flexible Packaging Market is expected to maintain strong momentum through 2033. Sustainability mandates, technological progress, and shifting consumer expectations will continue to reshape packaging material choices worldwide.

As circular economy principles become embedded across global manufacturing systems, PIR flexible packaging is positioned to play a central role in the future of sustainable packaging.

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