
Future of BioPackaging 2026

Turning BioPackaging Innovation into Market Opportunity

A market intelligence perspective by Ceresana

Opening keynote | Oliver Kutsch, CEO

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BioPackaging is entering a more disciplined market phase

Growth remains attractive — but application fit, economics and end-of-life concepts decide success

1

Growth is real, but selective

Not every material, region or application will scale at the same pace.

2

Packaging is the demand core

Packaging accounts for 59.7% of quantified bioplastics demand.

3

Value comes from fit

Performance, processing, price tolerance and regulation have to work together.

**The discussion is moving from
“Can it be made?” to “Where does it create
measurable market value?”**

Implication: strategy, scale-up and communication need stronger evidence than isolated innovation claims.



BioPackaging product structure: different materials, different market logics

BioPackaging-specific market shares help distinguish biodegradable and durable material strategies

76.1%

Biodegradable
materials

23.9%

Non-biodegradable
materials

BioPackaging product groups — share of market

PLA



31.4%

Others



17.6%

Starch-based



16.7%

PBAT



16.4%

Bio-PE



9.3%

PHA



8.6%



Market reading

PLA is the largest single product group, while starch-based materials and PBAT remain highly relevant.

Commercial meaning

Bio-based, biodegradable and compostable are not interchangeable concepts from a market perspective.

Applications: where BioPackaging demand is concentrated

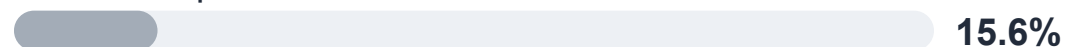
Food and beverages dominate demand — but each end-use sector has its own selection criteria

Industry shares — global BioPackaging demand

Food & beverages



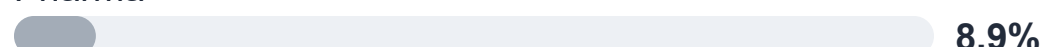
Consumer products



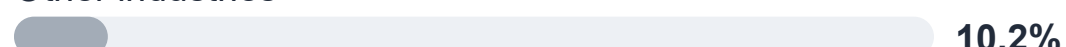
Cosmetics



Pharma



Other industries



Implication: the same material can have a strong business case in one application and a weak one in another.



Why food leads

Shelf life, barrier performance, line speed and waste prevention make packaging functionality non-negotiable.

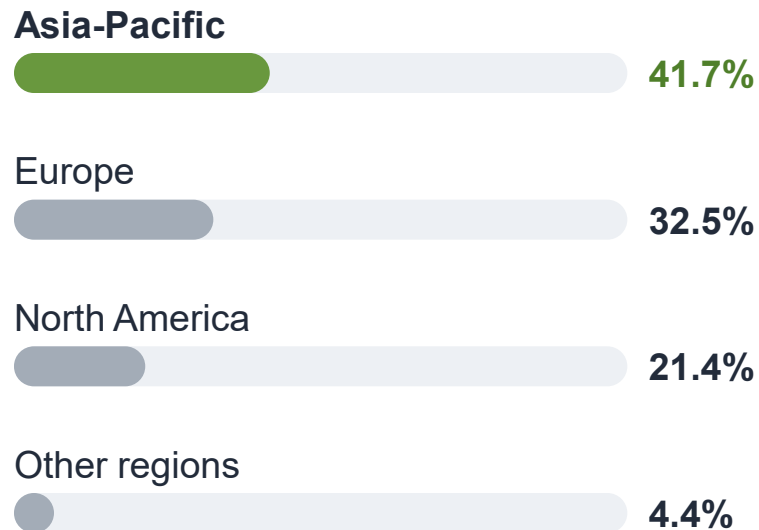
Why segmentation matters

Cosmetics, consumer goods and pharmaceutical packaging require different combinations of protection, image and pricing.

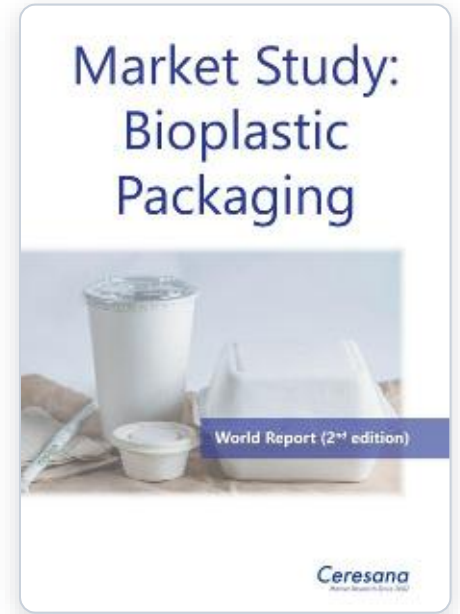
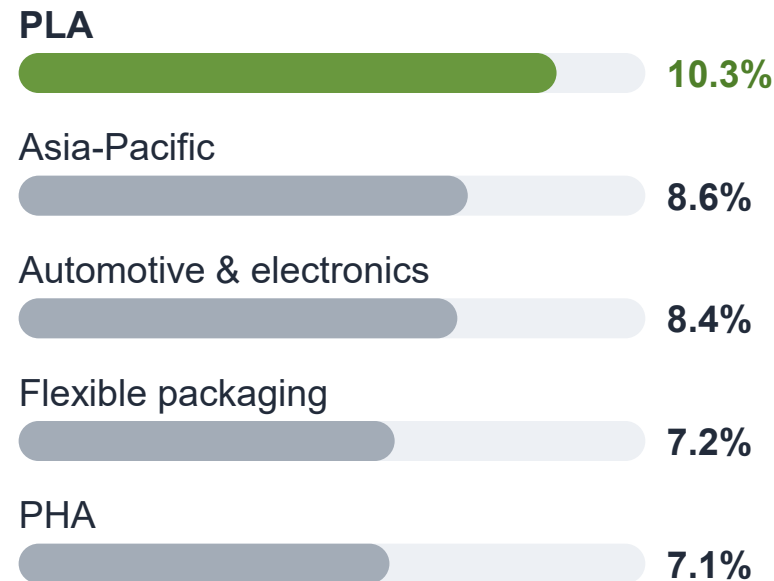
Regions and growth hotspots are uneven across the market

Strategic prioritization should combine current demand with medium-term growth outlook

Regional demand shares — 2024



Highest CAGR segments — 2024–2034



Further details:
ceresana.com/en/produkt/biobased-packaging-market-report

Decision message: “largest today” and “fastest tomorrow” are not always the same. Portfolio strategy should reflect both.

Innovation, trends and technologies are reshaping BioPackaging

The market is moving beyond simple material substitution toward application-specific solutions



Barrier coatings

Bio-based and hybrid coatings improve oxygen, moisture or grease resistance while keeping structures recyclable.

PLA & PHA innovation

Blends, additives and process optimization broaden usable performance windows.

Mono-material design

Design-for-recycling approaches gain importance as recyclability becomes a selection criterion.

Fiber + biopolymer hybrids

Paper-based solutions with functional bio-based layers are increasingly relevant.

Compostable niches

Compostable formats can create value where organic-waste logic or food contamination makes other routes less practical.

Commercial lens: winning technologies combine functionality, economics, compliance and credible sustainability benefits.

Regulation and customer pressure change the commercial decision framework

PPWR, claims scrutiny and circularity requirements affect how packaging solutions are evaluated

Regulation

PPWR and related rules influence design choices, material selection and qualification timing.

Brand pressure

Converters, brand owners and retailers ask for more credible sustainability roadmaps.

Claims scrutiny

Terms such as bio-based, recyclable or compostable need stronger evidence and clearer communication.

Supply strategy

BioPackaging can support fossil-substitution and resilience goals — but sourcing logic still matters.



What this means for BioPackaging decisions

- 1 Regulatory readiness becomes part of product–market fit.
- 2 Qualification and portfolio decisions accelerate toward 2030.
- 3 Simpler, clearer and more recyclable formats gain an advantage.
- 4 Market intelligence helps translate policy signals into demand scenarios.

Commercial readiness is determined by the weakest link

Five bottlenecks repeatedly decide whether a BioPackaging concept reaches the market

1

Performance

Barrier, sealing, shelf life,
safety and durability.

2

Economics

Material cost, conversion
cost and acceptable
premium.

3

Processing

Line compatibility, speed
and quality control.

4

End-of-life

Credible recycling or
composting route in
practice.

5

Customer pull

Clear reason for brands
and converters to switch.



Commercial readiness = the weakest link, not the average

A technically excellent package can still fail if one critical condition is not solved.

How Ceresana supports decisions in BioPackaging

Market studies, custom research and funded-project support answer different questions

1

Market studies

Rapid market orientation

- Market size and forecasts
- Applications and materials
 - Countries and regions
- Competitors and manufacturers

Where is the market moving?

2

Custom research

Decision-specific evidence

- TAM / SAM / SOM
- Target applications
- Customer & competitor analysis
- Pricing and market entry

Where should we invest or enter?

3

Consortia & funded projects

Commercialization support

- Market potential
- Value-chain mapping
- Exploitation strategy
- Commercialization pathways

How can this reach the market?

Benefit for participants: stronger evidence for strategy, sales, investment decisions, grant applications and partnerships.

Why Ceresana is a relevant partner for BioPackaging questions

The value proposition combines sector understanding, market evidence and commercialization perspective

Market expertise

Ceresana brings long-standing experience in industrial market research across packaging, plastics, chemicals and related value chains.

Custom relevance

Questions can be analysed at application, country, customer or value-chain level — depending on the decision at hand.

Consortium support

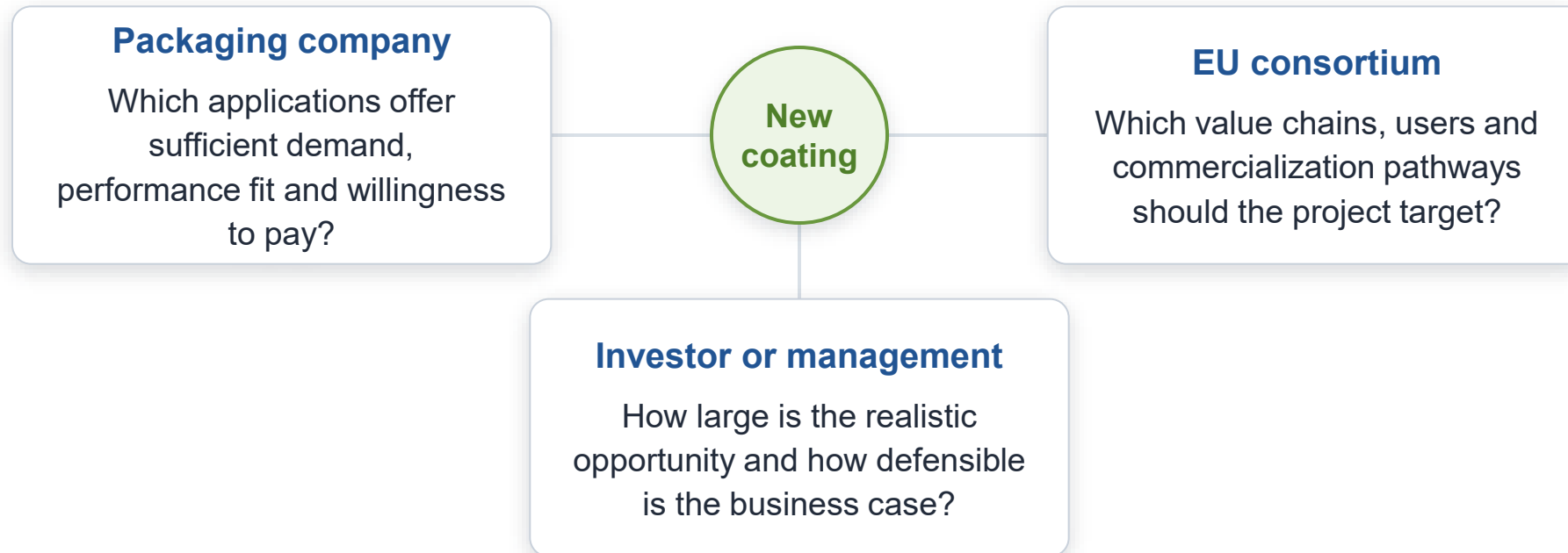
For EU and innovation projects, Ceresana can contribute market potential, exploitation logic and commercialization pathways.



One technology — three different decision needs

Example: a new bio-based barrier coating for packaging

Example technology: bio-based barrier coating



Same technology. Different decision. Different market-intelligence depth.

Turning BioPackaging innovation into market opportunity

The strongest concepts connect technical performance with market evidence

Right application

Proven performance

Viable economics

Credible end-of-life

Customer & regulatory
pull

DECISION MESSAGE

BioPackaging solutions do not win because they are “bio” — they win when they solve a real packaging problem better within a changing market framework.

**Thank you — and enjoy Future of
BioPackaging 2026.**

Continue the conversation today

1

Meet us on b2match

Discuss your packaging market questions, applications and regions.

2

Ask about relevant studies

Get oriented quickly with Ceresana's market reports and updates.

3

Explore your project case

Talk to us about custom research or funded-project support.

Connect with the Ceresana team via the event platform or at ceresana.com

More Future of Bio events by Ceresana



12.11.2026



09.12.2026



21.01.2027



Date to be announced