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SMART PACKAGING MARKET

By Technology (Active, Intelligent, and MAP), Industry Vertical (Food & Beverages, Automotive, Healthcare, Personal Care, and Others) & Geography

GLOBAL FORECAST TILL 2020

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1 EXECUTIVE SUMMARY

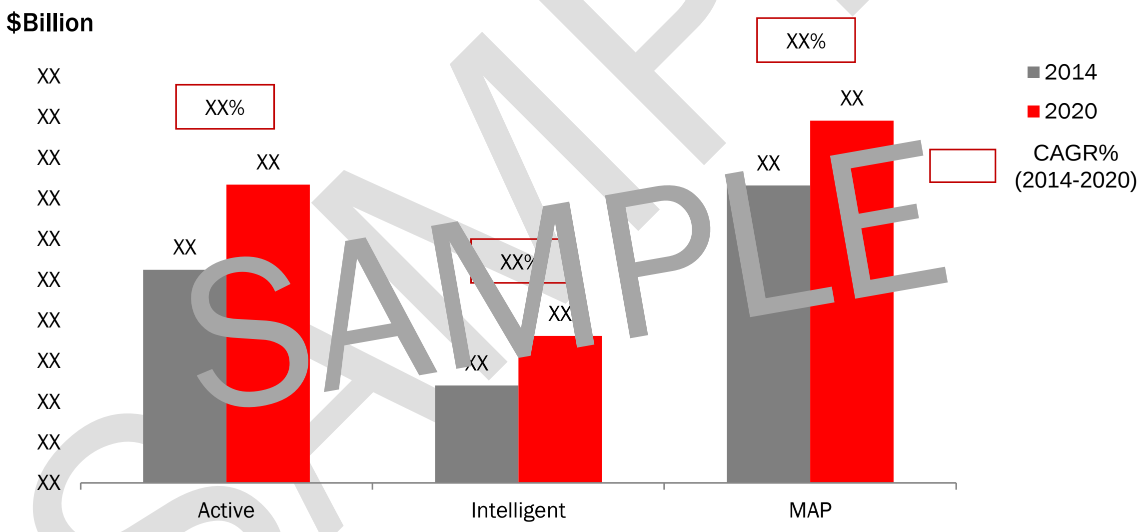
A smart packaging is a combination of different features of active and intelligent packaging. It generally involves sensing and measurement along with control over the quality and inner atmosphere, while communicating all this information to the end-user at the same time.

The overall market is forecast to reach $XX million by 2020 from $XX million in 2013, at a CAGR of XX% between 2014 and 2020.

The growth of smart packaging market is primarily triggered by the growth in consumer awareness about the quality of packed food, aging population, reduction in food wastage, stringent international regulations for packaging industry, and use of printed electronics in packaging in order to communicate it to consumers. Printed electronics, such as RFID and NFC, offer high growth opportunities for the smart packaging industry.

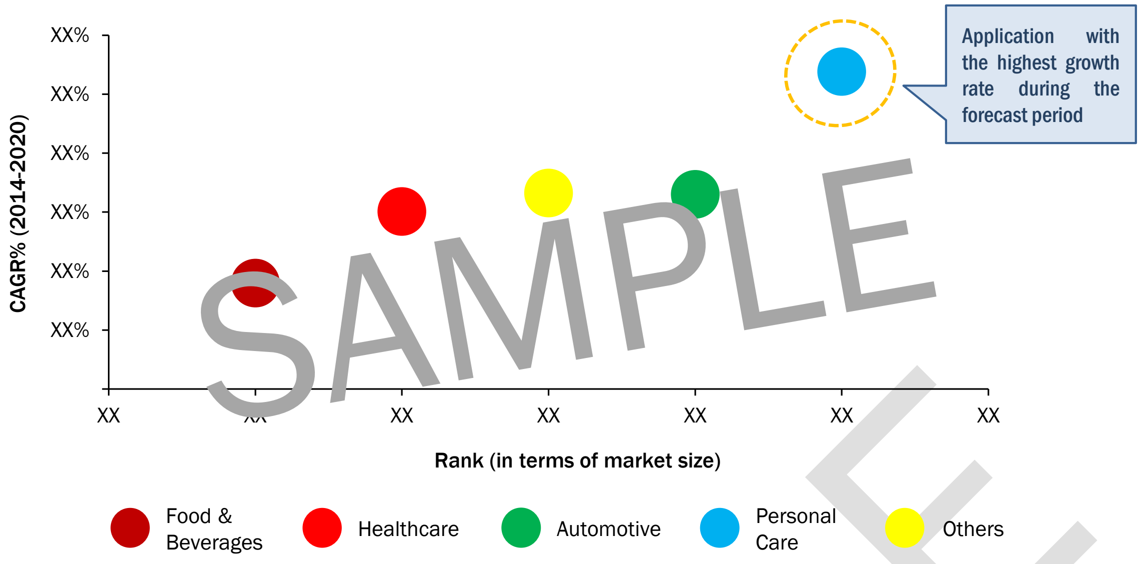
The smart packaging market is a diversified and competitive market with a large number of players. The players have been divided on the basis of active and intelligent packaging. Some of the key players in the market are BASF (Germany), TempTime Corporation (U.S.), Thin Film Electronics ASA (Norway), MeadWestvaco Corporation (U.S.), DuPont (U.S.), and PakSense Inc. (U.S.), among others.

FIGURE 1 SMART PACKAGING MARKET, 2014 & 2020 ($MILLION)



Source: *Press Releases, Investor Presentations, Annual Reports, Expert Interviews, and MarketsandMarkets Analysis*

FIGURE 2 GLOBAL SMART PACKAGING MARKET, BY INDUSTRY VERTICAL, 2014



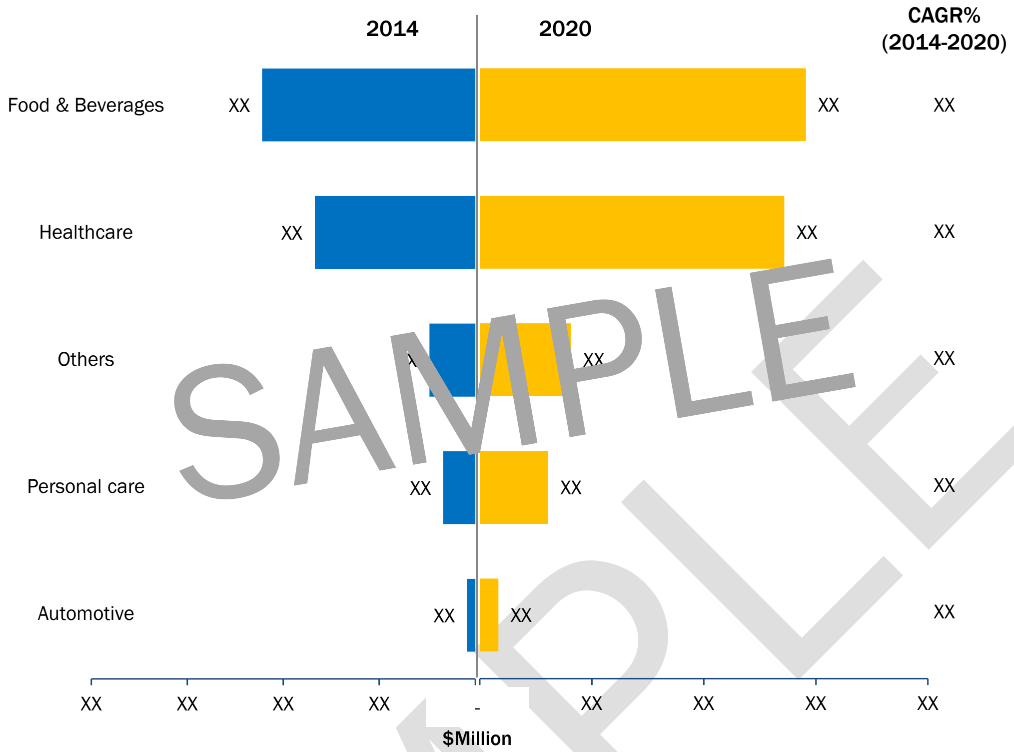
Source: Press Releases, Investor Presentations, Annual Reports, Expert Interviews, and MarketsandMarkets Analysis

The global smart packaging market revolves around three major verticals, namely technology, industry vertical, and geography. The type segment covers active, intelligent, and modified atmosphere packaging (MAP). Both active and intelligent packaging have further been sub-divided into different types on the basis of different principles involved. The industry vertical segment has been divided into food & beverages (F&B), healthcare, automotive, personal care, and others (electronics, logistics, energy, and so on). Food & beverage and healthcare are currently the biggest industries for the smart packaging market. Personal care is expected to grow at a high rate of XX% between 2014 and 2020.

FIGURE 3 ACTIVE PACKAGING MARKET SNAPSHOT (2014 VS 2020): THE ANTIMICROBIAL TECHNOLOGY IS EXPECTED TO GROW AT THE HIGHEST RATE DURING THE FORECAST PERIOD

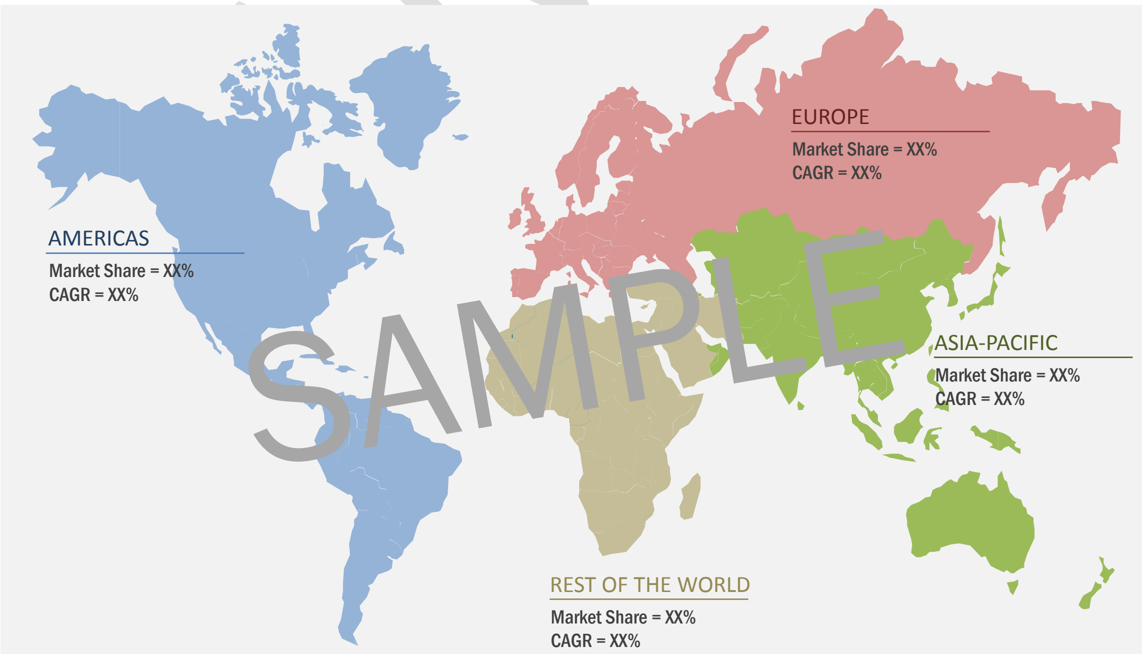
Source: Press Releases, Investor Presentations, Annual Reports, Expert Interviews, and MarketsandMarkets Analysis

FIGURE 4 INTELLIGENT PACKAGING MARKET SNAPSHOT (2014 VS 2020): THE F&B INDUSTRY IS EXPECTED TO DOMINATE THE MARKET DURING THE FORECAST PERIOD



Source: Press Releases, Investor Presentations, Annual Reports, Expert Interviews, and MarketsandMarkets Analysis

FIGURE 5 GLOBAL SMART PACKAGING MARKET SHARE, BY REGION, 2014



Source: Press Releases, Investor Presentations, Annual Reports, Expert Interviews, and MarketsandMarkets Analysis

Note: CAGR has been calculated between 2014 and 2020.

On the basis of geography, the smart packaging market has been segmented into four major regions, namely the Americas, Europe, APAC, and RoW. Europe dominated the global market in 2014 with a market share of ~XX% market share, followed by the Americas with ~XX%.

APAC is expected to grow at the highest rate during the forecast period at a CAGR of XX% between 2014 and 2020, compared to CAGR of XX% and XX% for Europe and the Americas, respectively. The stringent regulations related to food packaging that was implemented way before in Europe as compared to the Americas are the primary reason for its highest share. A growth in the overall packaging industry is expected to be the fastest in developing economies, such as India and China, thus contributing to the growth rate of the overall APAC region.

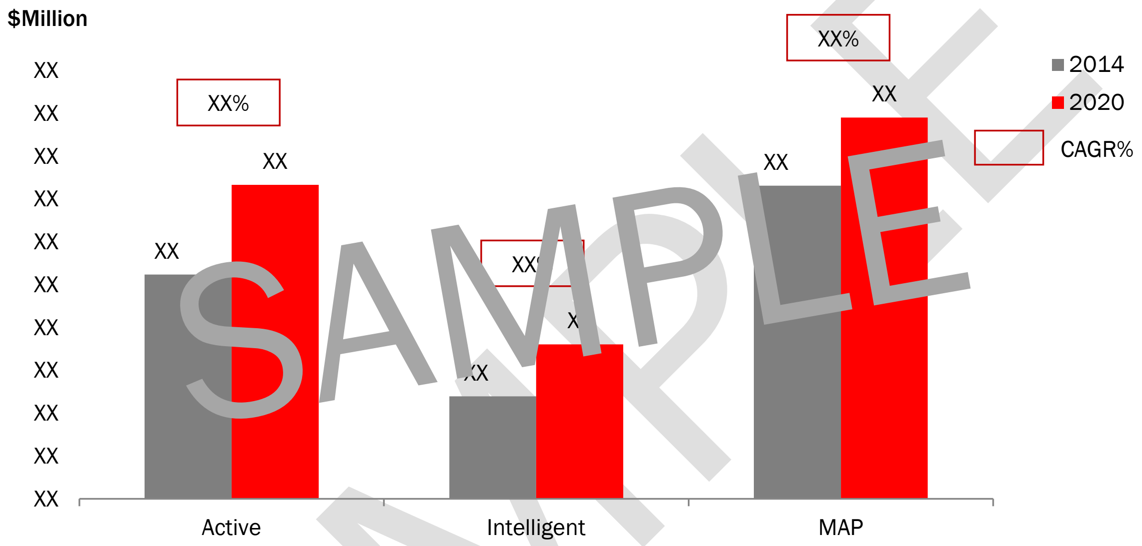
2 MARKET, BY TECHNOLOGY

2.1 INTRODUCTION

This section divides the smart packaging market on the basis of technology into three types which are active packaging, intelligent packaging and modified atmosphere.

Active packaging has further been divided in to anti-microbial, gas scavengers, moisture control, and corrosion control technologies; whereas intelligent packaging has been sub-divided into indicators and tracking devices.

FIGURE 6 SMART PACKAGING MARKET SIZE, BY TECHNOLOGY, 2014 & 2020 ($MILLION)



Source: Company Annual Reports, Investor Presentations, Primary Interviews, and MarketsandMarkets Analysis

TABLE 1 SMART PACKAGING MARKET, BY TECHNOLOGY, 2013–2020 ($MILLION)

Technology	2013	2014	2015	2016	2018	2020	CAGR% (2014–2020)
Active	XX	XX	XX	XX	XX	XX	XX
Intelligent	XX	XX	XX	XX	XX	XX	XX
MAP	XX	XX	XX	XX	XX	XX	XX
Total	**XX**	**XX**	**XX**	**XX**	**XX**	**XX**	**XX**

Source: Expert Interviews, Secondary Research, and MarketsandMarkets Analysis

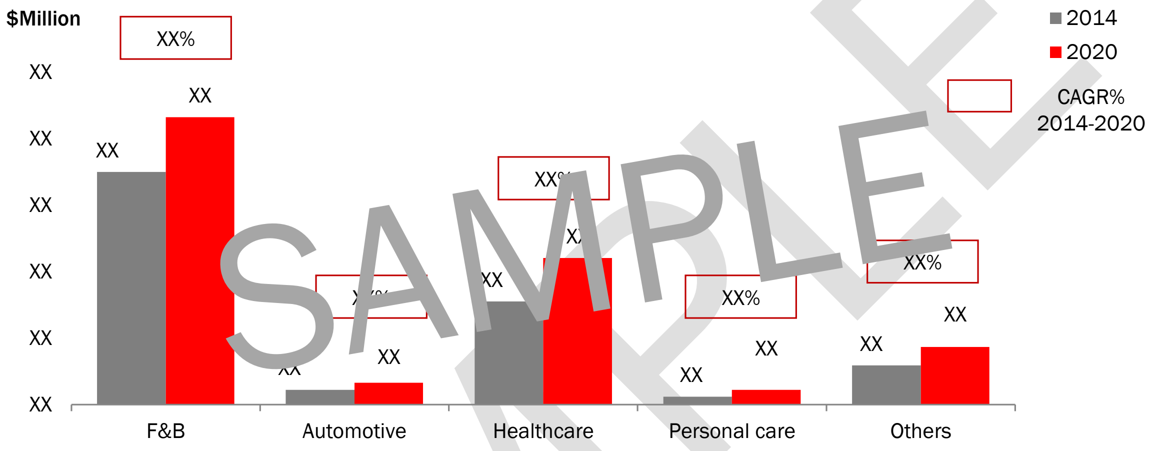
The total smart packaging market is expected to grow at a CAGR of XX% between 2014 and 2020, with intelligent packaging to grow at the maximum rate of XX%, mainly due to the recent developments of printed electronics technology. The modified atmosphere packaging is expected to hold the largest share worth XX% during the forecast period with a market size of $XX million in 2013. It is estimated to reach $XX million by 2020 at a CAGR of XX% between 2014 and 2020 due to developments in the packaging of F&B and healthcare industries.

3 MARKET, BY INDUSTRY VERTICAL

3.1 INTRODUCTION

This chapter analyzes the trends of the market for the smart packaging applications. These applications include food & beverages, logistics, healthcare, personal care, and electronics. A wide variety of packaging techniques and safety measures is used to keep the products from getting spoiled or damaged. Food and beverages industry was the biggest market for smart packaging in 2014 with a market size of $XX million that is expected to grow at a CAGR of XX% between 2014 and 2020. Personal care industry is presumed to experience the highest growth rate of XX% between 2014 and 2020.

FIGURE 7 SMART PACKAGING MARKET SIZE, BY VERTICAL, 2014 & 2020 ($MILLION)



Source: Expert Interviews, Secondary Research, and MarketsandMarkets Analysis

TABLE 2 SMART PACKAGING MARKET SIZE, BY VERTICAL, 2013–2020 ($MILLION)

Vertical	2013	2014	2015	2016	2018	2020	CAGR% (2014–2020)
F&B	XX	XX	XX	XX	XX	XX	XX
Automotive	XX	XX	XX	XX	XX	XX	XX
Healthcare	XX	XX	XX	XX	XX	XX	XX
Personal care	XX	XX	XX	XX	XX	XX	XX
Others	XX	XX	XX	XX	XX	XX	XX
Total	**XX**	**XX**	**XX**	**XX**	**XX**	**XX**	**XX**

Source: Expert Interviews, Secondary Research, and MarketsandMarkets Analysis

The F&B industry dominated the smart packaging market with a market size of $XX million in 2013. This is expected to reach $XX million by 2020, growing at a CAGR of XX% between 2014 and 2020. The personal care segment is expected to register the highest growth rate of XX% between 2014 and 2020 to reach $XX million by 2020. This high growth rate is mainly attributed to the growth of antimicrobial packaging employed in personal care products.

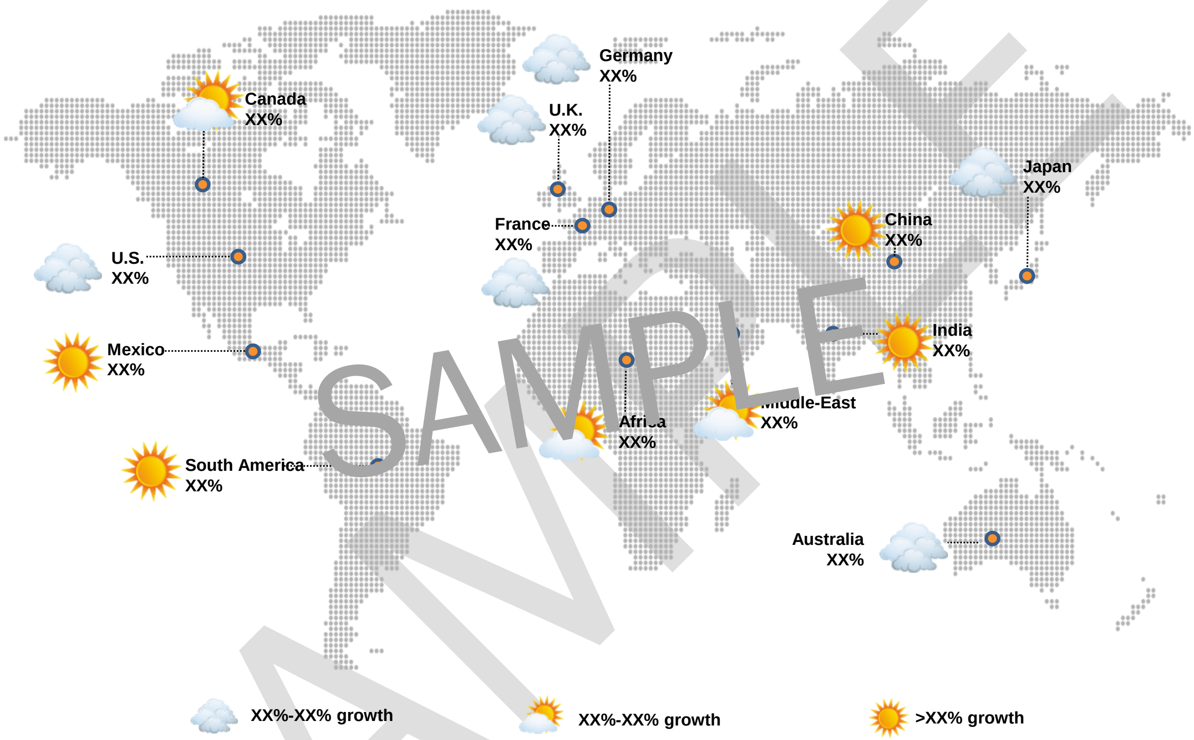
The healthcare and F&B industries hold a substantial market size of the smart packaging industry with both having a combined share of ~XX% in 2013. Among these, the healthcare sector is expected to reach $XX million by 2020, growing at a faster rate of XX% during the forecast period.

4 MARKET, BY GEOGRAPHY

4.1 INTRODUCTION

The global smart packaging market in this report has been segmented into four major geographies, namely the Americas, Europe, APAC, and RoW. The global smart packaging market was valued at $XX million in 2014; Europe held the largest market share of ~XX% in 2014, followed by the Americas with ~XX% in the same year. APAC region is anticipated to have the highest growth rate of XX% during the forecast period.

FIGURE 8 GEOGRAPHIC SNAPSHOT (2014) – GROWING ECONOMIES ARE EMERGING AS NEW HOTSPOTS



Source: Expert Interviews, Secondary Research, and MarketsandMarkets Analysis

TABLE 3 SMART PACKAGING MARKET SIZE, BY REGION, 2013–2020 ($MILLION)

Region	2013	2014	2015	2016	2018	2020	CAGR% (2014–2020)
Americas	XX	XX	XX	XX	XX	XX	XX
Europe	XX	XX	XX	XX	XX	XX	XX
APAC	XX	XX	XX	XX	XX	XX	XX
RoW	XX	XX	XX	XX	XX	XX	XX
Total	**XX**	**XX**	**XX**	**XX**	**XX**	**XX**	**XX**

Source: Expert Interviews, Secondary Research, and MarketsandMarkets Analysis

Europe dominated the global smart packaging market in 2013 with a market size of $XX million. This region is estimated to reach $XX million by 2020, growing at a CAGR of XX% between 2014 and 2020. The implementation of strict regulations regarding active and intelligent packaging for food industry in the European Union, way back in 2004 plays a key role in making it the biggest market for smart packaging. European companies are also continuously investing in healthcare development and a corresponding demand is expected for healthcare packaging, which is the second largest industry vertical in the smart packaging market.

The Americas is projected to replace Europe as the dominant smart packaging market by 2020 with a market size of $XX million from its market size of $XX million in 2013. It is expected to grow at a CAGR of XX% during the forecast period. APAC is presumed to experience the highest growth rate of XX% between 2014 and 2020 to reach $XX million by 2020.