

IMP

# Navigating the Global Packaging Industry

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Complexity, Compliance, and the Race for Sustainable Solutions

Industry Intelligence White Paper

Packaging Strategy

Sustainability & PPWR

Machinery & Automation

B2B Market Intelligence

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01

## Executive Summary



**Packaging is no longer a commodity decision. It is a strategic intersection of regulatory compliance, material science, supply chain resilience, and brand communication — and the organisations navigating that intersection most effectively are gaining durable competitive advantage.**

— IMP Industry Intelligence

The global packaging industry — valued at approximately \$1.2 trillion in 2025 and forecast to reach \$1.5 trillion by 2032 — is undergoing its most significant structural transformation in decades. Three converging forces are driving this change simultaneously: the most ambitious regulatory overhaul in the industry's history, an accelerating shift in material preferences driven by sustainability mandates and consumer pressure, and a digitalisation wave reshaping how packaging is designed, manufactured, and managed across complex global supply chains.

This white paper addresses the full packaging value chain — from material converters and flexible packaging producers to integrated processing and packaging machinery providers — across the segments and geographies where change is most acute. It identifies where market dynamics, regulatory pressure, and buyer behaviour are shifting fastest, and what the implications are for companies competing across this landscape.

Section 10 addresses in depth the B2B communication challenge that is both a persistent weakness across the industry and a significant competitive differentiator for companies that close it effectively: the structural gap between what packaging companies communicate and what customers, regulators, and investors actually need to understand.

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global packaging market  
value in 2025  
(Smithers, 2025)

Aug 2026

EU PPWR Regulation  
application date —  
all EU markets affected

8.2%

CAGR of packaging  
automation market  
2025–2034 (FBI, 2025)

Sources: Smithers, *The Future of Global Packaging to 2030 (2025)*; Fortune Business Insights, *Packaging Automation Market (2025)*; Persistence Market Research, *Global Packaging Market (2025)*

1 The EU Packaging and Packaging Waste Regulation (PPWR, Regulation EU 2025/40) entered into force in February 2025 and becomes broadly applicable from August 2026, mandating full recyclability of all packaging by 2030 and specific recycled content thresholds — with direct and immediate implications for every company placing packaging on EU markets.

2 The shift to mono-material and paper-based flexible packaging is accelerating faster than most converters projected, driven simultaneously by regulatory pressure and brand-owner procurement standards. Major FMCG companies have committed to making all packaging recyclable, reusable, or compostable.

3 Packaging automation is the fastest-growing segment of packaging capital expenditure, with the market projected to grow from \$78 billion in 2025 to \$158 billion by 2034. The integration challenge is now as significant as the technology investment itself.

4 The B2B communication gap between packaging technology providers and professional buyers is structurally wider than in most industrial sectors — creating meaningful competitive opportunity for companies that close it with evidence-based, audience-specific content.

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## A Trillion-Dollar Industry at a Turning Point

The global packaging industry is large, structurally essential, and growing with notable resilience. According to Smithers' most recent global packaging forecast, the market was valued at approximately \$1.2 trillion in 2025, growing at a compound annual rate of 3.5% toward 2030. Fortune Business Insights places the 2025 figure at \$1.1 trillion with a 3.9% CAGR to 2032. Methodological differences across research providers produce a range of estimates, but the directional consensus is consistent: the packaging industry is a durable, growing, and strategically important global market.

Asia-Pacific dominates — accounting for approximately 38–40% of total global packaging consumption in 2025, driven by rising middle-class purchasing power, urbanisation, and rapid expansion of packaged food and consumer goods markets across China, India, and Southeast Asia. North America is the second-largest market, representing approximately 18–20% of global value, with Europe a close third. The Western European and North American markets are structurally more mature, growing below the global average rate, but leading on regulatory development, sustainability investment, and premium packaging innovation.

### Global Packaging Market: Regional Growth Index (Base: Western Europe = 100)



Relative growth index to 2030. Western Europe baseline = 100. Source: Smithers, *The Future of Global Packaging to 2030 (2025)*

### Segment Dynamics

The food and beverage sector remains the dominant end-use, accounting for the largest share of global packaging demand. Flexible packaging — bags, pouches, films, sachets — is the fastest-growing format category, with the global flexible packaging market valued at approximately \$323 billion in 2025 and forecast to reach \$489 billion by 2034 at a 4.7% CAGR (Towards Packaging, 2026). Within flexible packaging, confectionery, bakery, coffee, and pet food are among the highest-volume categories for specialised converters in Europe and globally.

Packaging automation represents the most rapidly expanding capital investment category. The global market stood at \$78 billion in 2025 and is projected to reach \$158 billion by 2034 at a CAGR of 8.2% (Fortune Business Insights, 2025). This growth is driven by labour cost pressures, rising SKU complexity, the operational efficiency demands of FMCG customers, and the integration demands of smart packaging and traceability requirements.

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## The Regulatory Transformation: EU PPWR and Beyond

The most consequential regulatory development in the global packaging industry is the EU Packaging and Packaging Waste Regulation — Regulation (EU) 2025/40, known as the PPWR. Adopted by the European Council in December 2024, published in the EU Official Journal on 22 January 2025, and entering into force on 11 February 2025, the PPWR replaces the 1994 Packaging Directive with a directly applicable regulation that applies uniformly across all EU member states without requiring national transposition.



*The shift from a directive to a regulation is one of the most significant changes in EU packaging law — it creates a single, coherent set of rules across all member states, eliminating the fragmented national implementations that companies previously had to navigate.*

— Gleiss Lutz, EU Packaging Regulation Analysis, 2025

### PPWR Key Timeline

Date	Milestone	Impact
11 Feb 2025	PPWR enters into force	Regulation legally binding across EU
12 Aug 2026	General application begins	Most provisions apply; design & labelling requirements activate
12 Aug 2026	PFAS limits in food contact packaging	Food-contact packaging with PFAS above limits cannot be placed on EU market
1 Jan 2028	EC delegated acts on recyclability	Design-for-recycling grades (A–C) framework published
2028–2029	Harmonised labelling	Uniform EU recycling symbols required on all packaging
1 Jan 2029	Deposit-return systems	Mandatory deposit systems in all member states for eligible containers
1 Jan 2030	Recyclability and recycled content thresholds	Only grades A–C permitted; minimum 5% volume reduction target applies
From 2030	Single-use plastic bans (Annex V)	Single-use plastic for condiments, coffee creamer, sugar in HORECA banned
By 2035	Recycled at scale requirement	All packaging must be recyclable in practice, not just in design
By 2038	Only grades A and B permitted	Phase-out of all lower-performing packaging formats
By 2040	Volume reduction target: 15%	Progressive milestones: 5% by 2030, 10% by 2035, 15% by 2040

Sources: European Commission (environment.ec.europa.eu); Regulation (EU) 2025/40, OJ L 2025/40, 22.1.2025; Gleiss Lutz (2025); Circularise PPWR Guide (2025); Berlin Packaging (2025)

## The Broader Global Regulatory Context

The PPWR does not exist in isolation. India's Plastic Waste Management Rules impose comparable restrictions on single-use plastics. China's ambitious plastic ban framework continues to evolve. Several US states have enacted EPR legislation with packaging-specific requirements. For companies with global operations — machinery manufacturers serving markets across Europe, Asia, and the Americas, or converters whose customers distribute internationally — the regulatory landscape is not a single EU compliance challenge but a multi-jurisdictional navigation exercise that is becoming progressively more demanding.

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## Market Segments in Focus: Where Value Is Created and Challenged

The packaging industry is not a monolithic market. Value creation dynamics, competitive intensity, regulatory exposure, and growth trajectories differ substantially across segments. The following analysis maps the segments where change is most significant — from flexible food and consumer packaging to pharmaceutical and industrial formats, and the machinery and processing systems that serve them.

Segment	2025 Market Size	Key Driver	PPWR Exposure	Growth
Flexible food packaging	~\$323bn (global)	Convenience, shelf life, lightweighting	High	4.7% CAGR
Confectionery & bakery bags	Part of flexible food	FMCG brand standards, recyclability shift	Very High	Above market avg.
Pet food packaging	\$13.7bn, growing	Premiumisation, sustainability demand	High	5.3% CAGR to 2034
Pharma packaging machinery	\$7.6bn → \$13.6bn by 2034	GLP-1 drugs, biologics, aseptic demand	Medium (specific rules)	7.63% CAGR
Food packaging machinery	Part of \$78bn automation mkt.	Labour costs, OEE, SKU complexity	High (machine-material fit)	8.2% CAGR
Mono-material / recyclable flex.	\$2bn → \$4.2bn by 2036	PPWR, EPR fees, brand mandates	Directly regulatory-driven	7.7% CAGR
Smart / connected packaging	\$30bn → \$56bn by 2034	Traceability, anti-counterfeit, QR	Medium (labelling reqs.)	6.24% CAGR

Sources: *Towards Packaging (flexible packaging, 2026)*; *Precedence Research (pet food, 2025)*; *Towards Packaging (pharma machinery, 2025)*; *Fortune Business Insights (automation, 2025)*; *FactMR (mono-material, 2025)*; *Precedence Research (smart packaging, 2025)*

### The Converter Landscape

European flexible packaging converters — ranging from large multi-national groups to family-owned regional specialists — operate at the front line of the sustainability transition. Companies producing printed bags, pouches, and laminated films for confectionery, bakery, coffee, and pet food are facing the highest concentration of PPWR pressure, as these categories combine high packaging volume, direct consumer visibility, and assertive FMCG customer procurement requirements. Mid-market converters with genuine technical capability in mono-material structures and paper-based formats are well-positioned to differentiate — but must invest in demonstrating that capability in the language their customers use to make decisions.

### The Machinery and Processing Provider Landscape

Packaging machinery companies range from global integrated providers serving pharmaceutical, food, and consumer goods markets, to specialist machine builders focused on specific process types (flow wrapping, VFFS, tray sealing, cartoning) or end markets. For machinery providers, the PPWR creates both challenge and opportunity: the material transition is forcing food and consumer goods producers to re-evaluate machinery compatibility, opening replacement and upgrade investment cycles. Companies that are first to validate and document their equipment's performance on sustainable substrates — mono-material films, paper-based structures, recycled-content materials — will capture a disproportionate share of this investment.

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## The Sustainability Imperative: Materials, Compliance, Competitive Pressure

Sustainability in packaging has crossed the threshold from aspiration to operational imperative. The regulatory pressure of the PPWR is reinforced by the procurement standards of major FMCG brand owners — Nestlé, Unilever, and others have committed to making all packaging recyclable, reusable, or compostable — and by consumer sentiment that, while increasingly price-sensitive, consistently places recyclability as the top sustainability factor in purchasing decisions. According to McKinsey's 2025 consumer packaging research, 77% of consumers consider recyclability 'extremely' or 'very' important in packaging sustainability evaluations.

### 01 The Multi-Material Legacy

The majority of high-performance flexible packaging currently in use is constructed from multi-material laminates — combining polyethylene, PET, aluminium foil, and paper in structures that deliver excellent barrier performance but are practically impossible to recycle in existing collection systems. The PPWR's recyclability requirements create direct pressure on every converter still producing such structures. Transition to mono-material equivalents that meet the same performance specifications is technically complex and capital-intensive.

### 02 The Mono-Material Performance Gap

Mono-material flexible packaging — constructed from a single polymer type such as polyethylene or polypropylene — is significantly easier to recycle but historically has struggled to replicate the barrier and sealability performance of laminated structures. Recent advances in resin technology, solvent-free lamination, and barrier coating have substantially closed this gap, but the engineering challenge remains significant, particularly for food-contact applications where food safety requirements impose additional constraints.

### 03 EPR Fee Economics and Material Choice

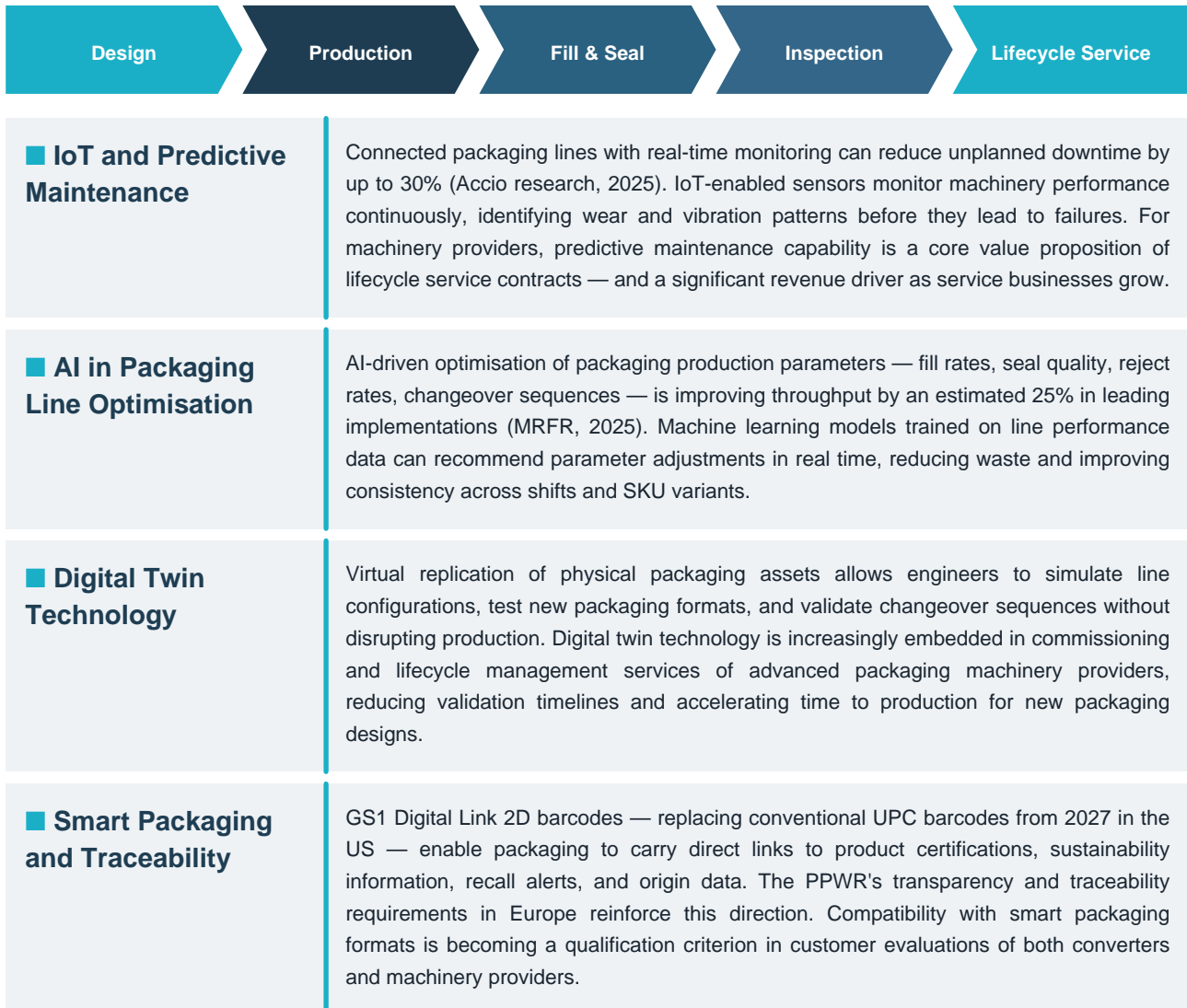
The PPWR's Extended Producer Responsibility framework requires manufacturers to bear the costs of collection, recovery, and recycling of their packaging. Eco-modulated EPR fee structures — where fees vary by recyclability — create direct financial incentives to transition to compliant materials. In Germany, the existing Grüner Punkt system already provides precise fee modulation based on recyclability, making material choice a direct and calculable financial variable. By 2030, these dynamics will apply across all EU member states.

### 04 The Paper Transition

Paper-based and paper-hybrid flexible packaging is experiencing accelerated growth as brands seek the consumer communication and recyclability credentials that paper offers. Paper packaging creates its own engineering challenges: moisture sensitivity, food safety barrier requirements, and compatibility with existing filling and sealing machinery all require specific technical solutions. Companies that have developed validated paper-compatible processes and machinery settings are ahead of the majority of the industry.

## Digitalisation and Automation: The Next Frontier

The packaging automation market — projected to grow from \$78 billion in 2025 to \$158 billion by 2034 at a CAGR of 8.2% — is the fastest-growing capital expenditure category in the broader packaging industry. Growth is driven by labour cost pressure, rising SKU complexity, the integration requirements of smart packaging and digital traceability, and OEE targets that are difficult to achieve without automation investment. According to PMMI's 2025 Top to Top Summit, 78% of industry leaders cited productivity as their top priority, with cost control and automation each named as critical focus areas by nearly half of participants.



## Geopolitical Complexity and Global Supply Chain Risk

The packaging industry operates within highly globalised supply chains — raw materials, films, machinery components, and finished packaging routinely cross multiple borders. Geopolitical disruption, trade policy volatility, and energy cost uncertainty have made supply chain resilience the dominant operational concern in the sector. The post-2020 era — COVID-19, inflation, geopolitical upheaval, and energy crisis — has fundamentally reshaped the industry's cost structure and operating assumptions (McKinsey, 2025).

### Raw Material Volatility

Packaging's heavy reliance on petroleum-based plastics and paper pulp exposes the industry to substantial cost volatility. In early 2024, all commodity resins — PE, PP, PS, PVC, and PET — experienced a sharp price decline following a period of soaring costs; this volatility directly compresses converter margins and makes long-term customer pricing commitments difficult to maintain. (Source: Persistence Market Research, 2025)

### Energy Cost Pressure in Europe

European packaging producers face energy costs structurally elevated since the 2022 energy crisis. Gravure and flexographic printing operations are energy-intensive, and the shift to solvent-free lamination processes (driven partly by sustainability requirements) requires capital investment that is difficult to justify in a volatile energy and demand environment. Gartner data indicates 66% of supply chain leaders have invested in mitigating raw material supply risks, yet under-preparation for geopolitical raw material risk remains common. (Source: Gartner / Packaging Europe, 2024)

### Regionalisation of Manufacturing

The strategic response to supply chain fragility is accelerating regionalisation: packaging companies are establishing multi-centre regional production and warehousing operations to shorten transport distances, reduce logistics risk, and improve responsiveness to local customer requirements. This creates tension with the scale economics that underpin cost structures of both large converters and global machinery providers — and opens opportunity for regionally-specialised producers with strong local customer relationships.

### Trade Policy Impact

In Q1 2025, North America's packaging sector saw a 2.1% dip in box volume — the lowest shipment levels since 2014 — partly driven by the disruption of US-China tariff escalation. The packaging industry is acutely exposed to the same geopolitical forces reshaping all global manufacturing, with additional sensitivity because packaging itself is a just-in-time supply to nearly every other manufacturing and distribution sector. The 'China plus one' supply chain strategy is now standard planning assumption for major FMCG packagers. (Source: Towards Packaging, 2025)

## Industry Signals: How Leading Players Are Responding

### Flexible Packaging Converters — Technical Differentiation on Sustainability

The most competitive flexible packaging converters in Europe are accelerating investment in mono-material structures and paper-based substrates as a direct response to PPWR pressure and FMCG customer requirements. Producers that have developed validated, high-performance sustainable packaging formats — backed by measurable barrier data and confirmed machinery compatibility — are winning specification approvals that competitors making generic sustainability claims cannot match. Investment in gravure and flexographic printing capability on new substrates is a critical differentiator. (Source: Mordor Intelligence, 2025)

### Packaging Machinery Providers — Lifecycle Partner Positioning

The leading packaging machinery companies are evolving from equipment manufacturers to 'strategic lifecycle partners' — offering predictive maintenance, digital line monitoring, format change support, and PPWR compliance validation alongside the physical equipment. This shift reflects where value is migrating: service revenue is growing faster than capital equipment revenue for the most advanced providers. The machinery companies capturing this value are those that have built connectivity and data analytics into their platforms and can demonstrate measurable OEE improvement for their customers. (Source: PMMI, 2025; Fortune Business Insights, 2025)

### Global Brand Owners — Procurement Standards Hardening

Major FMCG brand owners — including Nestlé, Unilever, Procter & Gamble, and others — are translating their public sustainability commitments into procurement requirements that their packaging suppliers must meet. Recyclability certification, recycled content documentation, and LCA (lifecycle assessment) data are increasingly required elements of supplier qualification — not just preferred attributes. Converters and machinery providers that can support their customers' sustainability reporting and compliance documentation with precise, verifiable data are structurally advantaged. (Source: McKinsey, 2025)

### Consolidation at Scale — and the Mid-Market Opportunity

Large-scale M&A is reshaping the top of the packaging value chain. Amcor's \$8.4 billion acquisition of Berry Global (announced November 2024) creates a global flexible packaging giant. International Paper's \$7.2 billion acquisition of DS Smith (completed January 2025) reshapes the European corrugated market. For mid-market European converters and regional machinery companies, this consolidation pressure is both a competitive threat — as major customers rationalise supplier bases toward fewer, larger partners — and an opportunity for technically differentiated specialists willing to invest in depth over breadth. (Source: Reuters, 2024; DS Smith / International Paper press releases, 2025)

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## Strategic Questions for Packaging Industry Leaders

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The following strategic questions address the dimensions most frequently underweighted in packaging industry planning — by both converters and machinery providers. They are designed to surface the decisions that will determine competitive position through 2030 and beyond.

### Q1 **What is your PPWR compliance roadmap — and is it product-level specific?**

Many European packaging companies have assessed PPWR at a headline level but have not mapped its full implications across their portfolio. Which current packaging formats will not meet the 2026 design requirements, the 2030 recyclability grades, or the recycled content thresholds? What is your timeline for material conversion, and what does your validation and certification process look like?

### Q2 **Where does mono-material conversion create technical risk in your product portfolio?**

For converters, the move to mono-material structures is not uniformly straightforward. Food contact regulations, barrier performance requirements, and machinery compatibility all vary by application. Which product lines create the most technically challenging conversion cases — and do you have the material science and testing capability to manage those conversions without customer quality events?

### Q3 **How exposed is your supply chain to geopolitical and energy volatility?**

Have you mapped the geographic concentration of your raw material sourcing, film supply, and energy inputs? What is your exposure to specific country dependencies? And what is your financial exposure if European energy costs remain structurally elevated for another three to five years?

### Q4 **Is your machinery compatible with the packaging formats your customers are moving toward?**

For producers, this means asking whether filling, sealing, and wrapping lines can run mono-material films and paper-based substrates at the speeds and quality levels customers require. For machinery providers, it means asking whether installed base and new machine designs are optimised for the sustainable packaging formats that will dominate purchasing specifications by 2028.

### Q5 **How are you communicating technical capability to customers who cannot evaluate it directly?**

In packaging, capability is often invisible to customers until something goes wrong. How are you demonstrating sustainability credentials, print quality, material compliance, and machinery reliability to procurement, sustainability, and operations decision-makers at brand owners — before they encounter a problem? This question is addressed in depth in Section 10.

## The B2B Communication Challenge in Packaging Markets

The packaging industry has a structural B2B communication problem that is distinct from most industrial sectors. Purchasing decisions involve multiple specialist functions simultaneously — procurement, sustainability, quality assurance, operations, and increasingly legal and regulatory affairs — each with a different information requirement that most packaging company marketing materials are not designed to address. The result is a persistent gap between what suppliers communicate and what customers need to understand before they can move from evaluation to commitment.



***Our procurement team needs a price. Our sustainability team needs a compliance roadmap. Our quality team needs validation data. Our operations team needs machine compatibility specs. We rarely receive content that speaks to more than one of those needs at once.***

— Category Director, major European FMCG manufacturer

### The Structural Communication Gap

What Suppliers Communicate	What Customers Evaluate	The Gap
Sustainability claims and certifications	PPWR compliance status by product and market	Compliance specificity absent
Material capabilities (broad)	Mono-material conversion evidence with performance data	Performance evidence for sustainable formats missing
Quality credentials and ISO certifications	Print quality on new substrates — paper, mono PE/PP	Technology transition not demonstrated
Company heritage and scale	Supply chain resilience — sourcing diversification	Geopolitical risk management invisible
Product catalogue breadth	Application-specific expertise and depth	Expertise signals lost in breadth positioning
Price and lead time	Total cost of compliance over product lifecycle	EPR costs and regulatory risk not modelled
Customer testimonials	Peer-reviewed or third-party validated data	Testimonials do not satisfy technical procurement

### Audience Matrix: Who Decides What, and What They Need

Closing the communication gap requires a clear understanding of the decision-making audience structure at packaging customers. The following matrix maps the five primary decision-influencing functions, their core decision criteria, the content formats that reach them most effectively, and the common supplier failure mode for each.

Function	Core Decision Criteria	Effective Content Format	Common Supplier Failure
Procurement	Total cost, lead time, supplier reliability, risk	TCO models, supply chain transparency reports, performance SLAs	Leading with unit price, ignoring total compliance cost
Sustainability / ESG	PPWR compliance, recyclability grades, LCA data, EPR exposure	Compliance roadmaps, recyclability certificates, LCA briefs, EPR fee calculators	Generic 'we're sustainable' claims without product-level specifics
Quality Assurance	Barrier data, seal integrity, food safety compliance, migration test results	Technical data sheets, test reports, migration certificates, conversion case studies with QA data	Marketing materials in place of technical documentation
Operations / Engineering	Machinery compatibility, changeover times, seal window, run speeds on new substrates	Machine compatibility matrices, substrate trial reports, OEE benchmark data	No proactive substrate compatibility data; forcing customer to test in-house
Regulatory Affairs	PFAS compliance, food contact regulations, labelling requirements, EPR registration	Regulatory compliance summaries by market, PFAS-free declarations, labelling guidance documents	Leaving regulatory documentation to customer; no proactive compliance support

## Building a Communication Plan That Works Across the Buying Centre

A packaging B2B communication plan that addresses the full buying centre — rather than defaulting to single-audience messaging — requires a structured content architecture with four interlocking components: positioning content, technical evidence, regulatory compliance documentation, and engagement formats.

### ■ 1. Positioning Content: Defining the Why

Positioning content establishes why a company's approach matters in the context of the market challenges customers are facing — regulatory pressure, material transition, supply chain complexity. It is not a product brochure: it is industry-level analysis, published in formats (white papers, market briefings, executive interviews) that demonstrate knowledge and signal credibility before any specific product or service is discussed. This is the content that builds awareness and trust at the level of leadership and strategic functions. It must be written in the language of industry challenges, not product features.

### ■ 2. Technical Evidence: Demonstrating the How

Technical evidence content translates positioning into capability proof. It includes conversion case studies (with actual data: barrier performance, seal strength, run speed on packaging lines), substrate trial reports, machine compatibility matrices, and product-specific data sheets. This content must be specific and factual — it is evaluated by quality, operations, and engineering functions who have the technical background to identify generic claims. The most credible technical evidence includes both success cases and honest discussion of the conditions and limitations under which the performance was achieved.

### ■ 3. Regulatory Compliance Documentation: Removing the Risk

Regulatory content addresses the PPWR compliance question directly: which specific packaging formats are compliant with which specific regulatory requirements, in which markets, and from which dates. This means product-level recyclability grade assessments, PFAS-free declarations for food contact applications, EPR registration documentation, and guidance on labelling requirements. Companies that publish this content proactively — rather than waiting for customers to request it — remove a significant barrier in procurement and approval processes and signal that regulatory competence is part of the supplier's core capability, not an afterthought.

### ■ 4. Engagement Formats: Reaching the Right People

Packaging B2B content is most effective when it is distributed through channels that actually reach the relevant decision-making functions. Procurement and sustainability professionals at FMCG companies are active on LinkedIn and at industry forums such as interpack, drupa, and the Packaging Innovations trade events. Trade publications — Packaging Europe, Packaging Digest, FoodBev Media — reach the operations and quality functions. Direct account-based marketing — personalised content packages addressing the specific compliance situation of a named potential customer — is the most effective format for high-value prospect development. Webinar-based technical seminars, targeted at sustainability and quality functions, provide a highly qualified engagement format that most packaging companies are not yet using systematically.

## Content Formats: Effectiveness by Audience and Objective

<p><b>Technical Compliance Brief</b> ★★★★★</p>	<p>Product-level PPWR compliance status, recyclability grade assessment, PFAS declarations. Directly addresses the sustainability and regulatory functions. Reduces time-to-approval in procurement processes.</p>
<p><b>Conversion Case Study with Performance Data</b> ★★★★★</p>	<p>Documented mono-material or paper conversion — barrier data, seal results, machine speed, QA outcome. Addresses quality and operations functions. Most persuasive format for technical decision-makers.</p>
<p><b>Machinery Compatibility Matrix</b> ★★★★■</p>	<p>Substrate-by-machine performance data: seal window, run speed, changeover time. Directly removes the machinery risk barrier that delays specification approval. Rarely published proactively.</p>
<p><b>EPR and Regulatory Roadmap Brief</b> ★★★★■</p>	<p>Practical analysis of PPWR timelines, EPR fee structures, and financial implications by product category and market. Reaches sustainability and regulatory affairs; positions supplier as compliance partner.</p>
<p><b>White Paper / Industry Analysis</b> ★★★★■</p>	<p>Market intelligence — like this document — that demonstrates understanding of industry challenges. Builds credibility and awareness at leadership and strategic levels. Effective as gated content for lead generation.</p>
<p><b>Account-Based Technical Package</b> ★★★★■</p>	<p>Personalised content bundle addressing the compliance situation of a named potential customer: their product categories, their market exposure, their machinery. Highest conversion rate; requires investment per account.</p>
<p><b>Trade Publication Articles</b> ★★★██</p>	<p>Authored technical articles in Packaging Europe, FoodBev Media, and specialist trade press. Builds third-party credibility. Reaches quality and operations functions. Slower to produce; long-tail value.</p>
<p><b>LinkedIn / Digital Content</b> ★★★██</p>	<p>Short-form educational content — regulatory updates, sustainability data, application snapshots — reaching procurement and sustainability functions at FMCG companies. High volume required; best used to amplify deeper content.</p>

## Outlook and Recommendations

The global packaging industry will look substantially different by 2030 than it does today. The regulatory environment is materially more demanding, the material mix is shifting away from multi-layer conventional plastics, automation investment is accelerating, and customer expectations are rising on every performance dimension simultaneously. The organisations best positioned to capture value in this environment share several characteristics: they act on regulatory requirements ahead of mandatory deadlines, invest in material and process innovation before customers demand it, and communicate their capabilities in the language of their customers' actual concerns.

The window for proactive positioning is open now. Companies that treat August 2026 as the deadline for PPWR preparation — rather than as a starting point — will face compliance cost pressure that organisations that have already moved will not. The same logic applies to automation investment, supply chain diversification, and B2B communication strategy.

### For Packaging Converters (Flexible Packaging, Printing, Lamination)

- Complete a full PPWR portfolio audit by product line, application, and target market — and publish the results to customers as a compliance roadmap, not just an internal planning document.
- Accelerate mono-material and paper-based substrate development for highest-volume, highest-PPWR-exposure product lines before brand-owner procurement standards harden. Document the performance data, not just the capability claim.
- Map raw material and film sourcing concentration risk and develop alternative sourcing strategies before the next geopolitical disruption materialises.
- Invest in the communication of technical capability: conversion case studies with data, substrate trial reports, compliance briefs by product category. Generic sustainability claims are table stakes; evidence-based communication is the

### For Packaging Machinery Providers

- Ensure all new machine designs and major retrofit programmes explicitly address compatibility with mono-material films and paper-based substrates — and publish this capability with performance data, not feature lists.
- Develop service contract frameworks that include PPWR compliance validation support, helping customers document machinery performance on new sustainable substrates as part of their regulatory documentation.
- Leverage lifecycle data from installed bases to quantify the OEE and total cost of ownership advantage of your systems — in terms that procurement functions can model, not just engineering functions can appreciate.
- Invest in IT-OT integration capability and open data standards to address the majority of CPG customers who cite communication protocol fragmentation as a barrier to digital integration of packaging lines.

## For B2B Marketing and Communication Strategy

- Audit all existing content against the audience matrix in Section 10: which of the five decision-influencing functions does your current content actually reach? Build a plan to close the gaps before a competitive review cycle begins.
- Prioritise technical compliance content — PPWR compliance briefs, recyclability grade documentation, PFAS declarations, EPR fee analysis — as the highest-leverage content investment for the 2025–2028 period.
- Build content programmes around conversion evidence and application depth: case studies with real data, substrate trial reports, machine compatibility matrices. This is the content that moves specification decisions.
- Develop account-based communication approaches for the highest-value prospective customers: personalised content packages that address their specific regulatory exposure, product categories, and operational questions.

**Key Sources** · Smithers, The Future of Global Packaging to 2030 (2025) · Fortune Business Insights, Global Packaging Market (2025) and Packaging Automation Market (2025) · Persistence Market Research, Global Packaging Market (2025) · Towards Packaging, Flexible Packaging Market (2026) · FactMR, High-Recyclability Mono-Material Flexible Packaging Market (2025) · Mordor Intelligence, Flexible Packaging Industry (2025) · Market Research Future, Packaging Automation Solution Market (2025) · European Commission / EUR-Lex, Regulation (EU) 2025/40 (PPWR), OJ L 2025/40, 22.1.2025 · Gleiss Lutz, EU Packaging Regulation Key Requirements (2025) · Circularise, PPWR Compliance Guide (2025) · McKinsey & Company, Sustainability in Packaging (2025) · PMMI, 2025 Economic Outlook and Top to Top Summit (2025) · Gartner / Packaging Europe, Geopolitical Uncertainties (2024) · Towards Packaging, North American Packaging Industry (2025) · Precedence Research, Pet Food Packaging Market (2025) · Precedence Research, Smart Packaging Market (2025) · Reuters / DS Smith press releases, Amcor / Berry Global and IP / DS Smith transactions (2024–2025)

## About IMP InterMediaPartners

IMP InterMediaPartners GmbH specialises in B2B marketing and content strategy for complex industrial and technology markets — including packaging, pharmaceutical manufacturing, chemical R&D, and laboratory technology.

We help organisations translate technical expertise into market authority through structured demand architecture, knowledge-transfer content, and precision media deployment.

[www.intermediapartners.de](http://www.intermediapartners.de)