

SUSTAINABILITY IN SECONDARY & PROTECTIVE PACKAGING



Produced by Smithers in
association with Easyfairs



SMITHERS



PACKAGING
INNOVATIONS



EMPACK

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About Smithers

Smithers is a global market leader in producing packaging industry reports with over 80 years' technical and scientific experience supporting companies around the world. Smithers publishes 40+ market reports per year in packaging, paper, print and sustainability, as well as security print, nonwovens and tires.

Our market research brings together a global network of industry experts to explore cutting-edge packaging market trends, combined with in-depth industry analysis and five-year market forecasts.

Drawing on proprietary databases, primary research, and our deep technical expertise, the result is credible, actionable insights. Smithers Market Intelligence enables our clients to confidently make successful business decisions. To find out more, visit [**smithers.com/services/market-reports**](https://www.smithers.com/services/market-reports).

Introduction

Exclusive insights into the key sustainability trends shaping the secondary and protective packaging market from official research partner Smithers.

Countries around the world are expected to adjust to the new trading environment over the next two years and the demand for secondary and protective packaging is forecast to be resilient over the five-year period, resulting in a market with a value of \$300.7 billion by 2030.

A key growth driver is e-commerce, the fastest growing end-use market for secondary and protective packaging. Corrugated materials dominate, and paper fill takes off in Western Europe; meanwhile, regulations such as PPWR are driving huge change in the industry.

The latest technologies in secondary and protective packaging will be showcased at Packaging Innovations & Empack 2026, the UK's largest packaging and processing event, taking place on 11 & 12 February at the NEC Birmingham.

In partnership with Smithers, the show brings together over 450 leading suppliers, 7,400 professionals and more than 80 expert speakers ready to share insights, demonstrate new technology and explore the trends driving our industry forward. You'll find everything from smart automation and AI to cutting-edge materials, machinery and sustainable solutions. More details and free tickets are at packagingbirmingham.com.

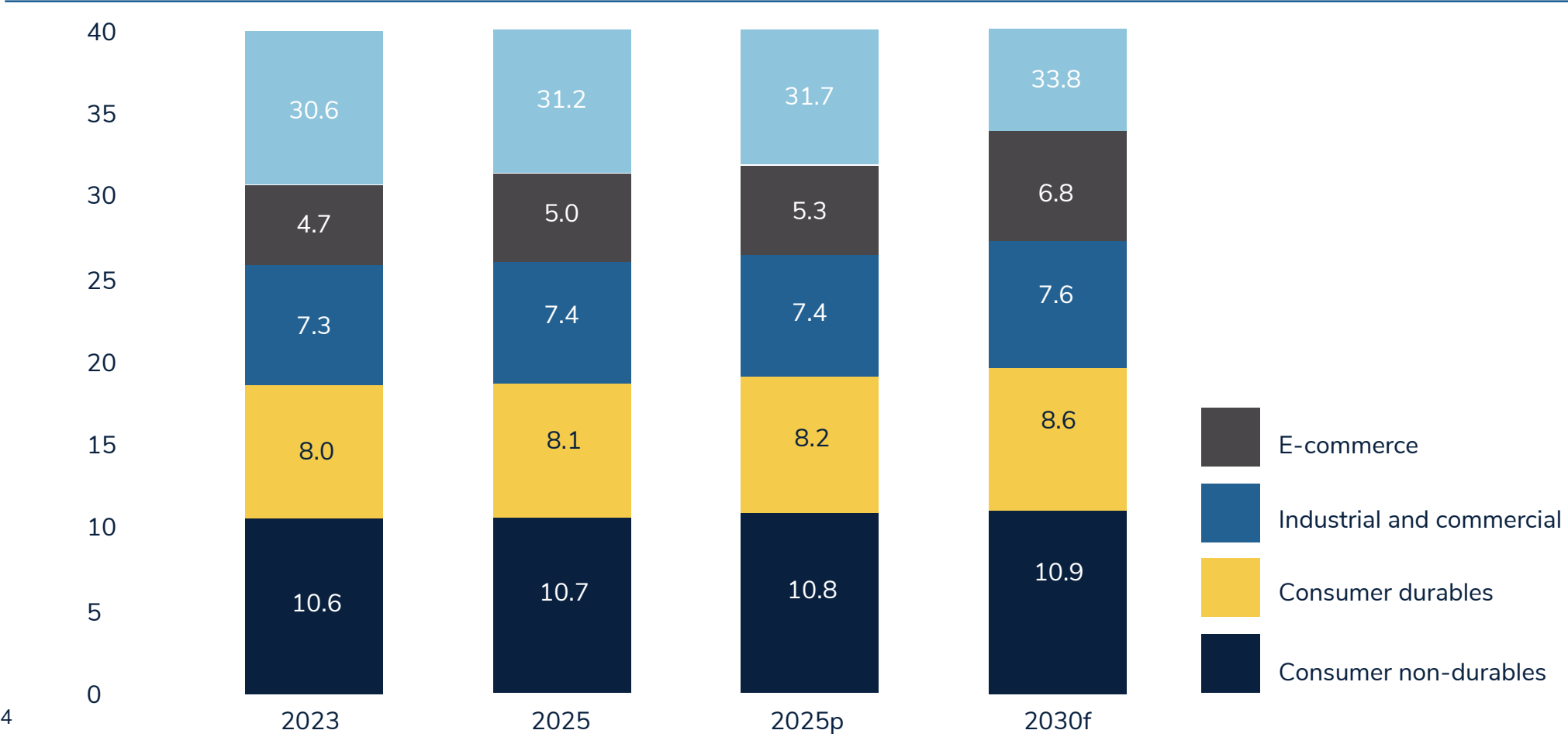
In this exclusive white paper, official research partner Smithers explores the key sustainability trends driving growth in the secondary and protective packaging market. You can find full, in-depth insight and analysis in the packaging market reports available exclusively to Smithers clients. Please visit smithers.com to **find out more**.



Rapid growth in e-commerce

E-commerce is the fastest growing end-use within secondary and protective packaging, driven by convenience and supply chain changes

EUROPEAN SECONDARY PACKAGING BY END-USE (VOLUME)





E-commerce

Growth in paper fill replacing bubble wrap, air pillows, and loose fill peanut foams. Growth in paper envelopes. Fibre replacing EPS and foil insulation bags.



Industrial and Commercial

Little need for aesthetics. Use of double or triple wall corrugated. Pulp-based inserts as alternative to foams.



Consumer Durables

Requirements for durability and strength plus security and theft prevention. Right sizing will impact on corrugated volumes.



Consumer Non-durables:

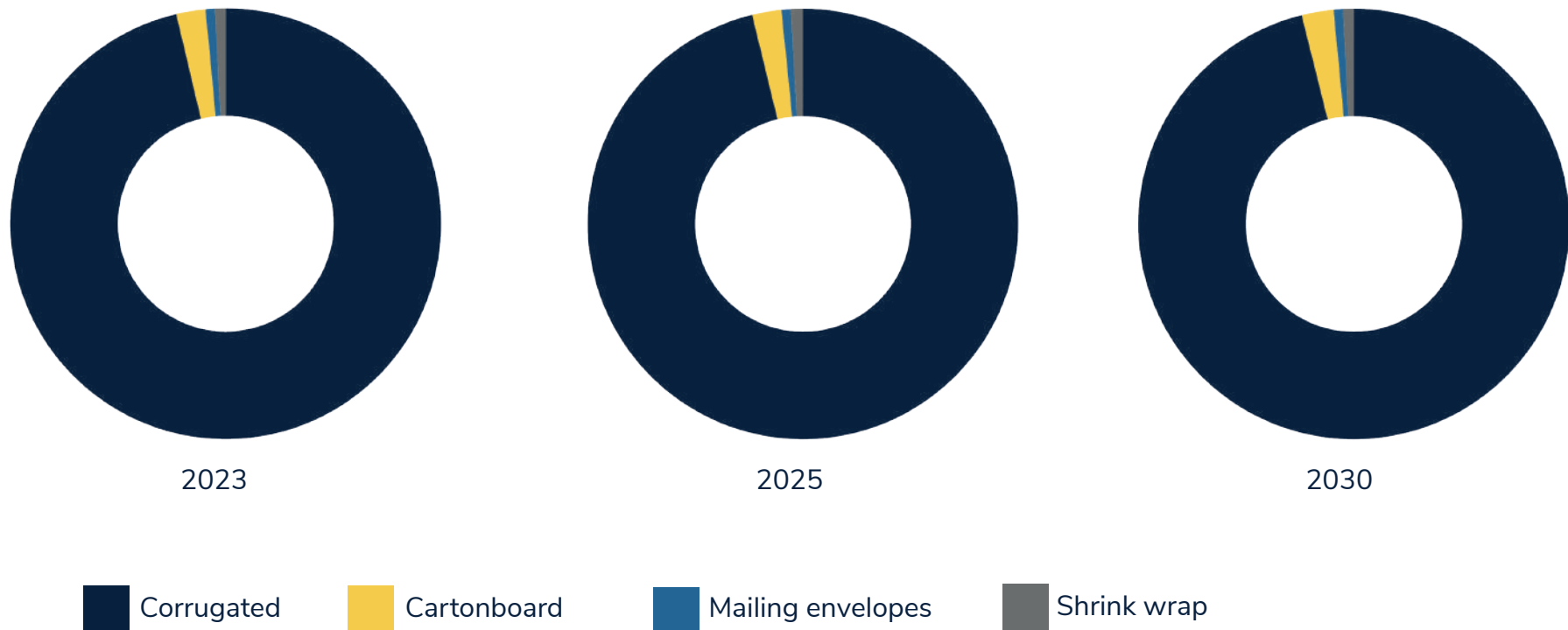
PPWR impacting shrink wrap for multi-packs, driving higher growth in cartonboard. Growth in retail-ready.

Source: The Future of Secondary and Protective Packaging to 2030, Smithers

Corrugated dominates market

But the drive towards right-sizing and PPWR 50% empty space target will lower growth rates

EUROPEAN SECONDARY PACKAGING BY PRODUCT (VOLUME)





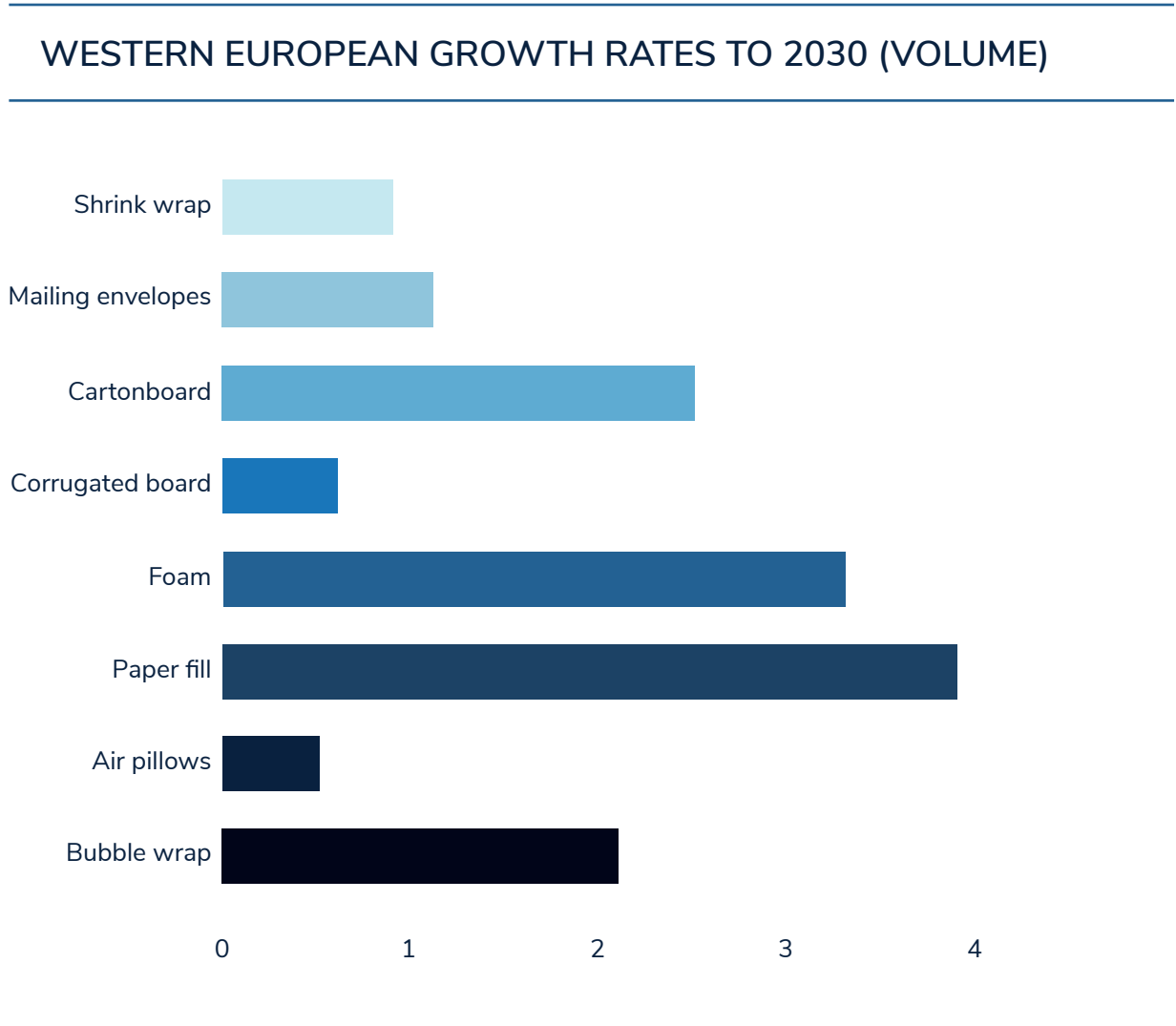
“Corrugated could face threat from transport packaging developments such as returnable plastic crates.”

KEY HIGHLIGHTS

- ▶ **Right-size packaging** minimises material use while maintaining product protection and branding.
- ▶ Many fully automated packing solutions on the market use **fanfold corrugated sheet** and deploy scanners and software to right-size to specification.
- ▶ The most sophisticated systems can **vary the size of packs in all dimensions** and are therefore expensive. Some of the most competitive systems use **standard consumable components** (like die-cut sheets of cardboard) designed around the e-retailer's mix of deliveries.

Paper fill: fast growth in Europe

Paper fill is the fastest growing material in West Europe at 3.9% CAGR to 2030. A key driver is the increased use of automated void fill dispensers, particularly by e-commerce distribution centres.





Twisted paper void fill



Strip cut shredded Kraft paper



Kraft paper void fill



Flexi-wrap moulded paper pulp

PPWR impacts collation wrap

As of 2027, the EU's PPWR will ban plastic packaging used at the point of sale to group goods.



“Innovations such as glue dots are replacing secondary packaging for multi-packs.”

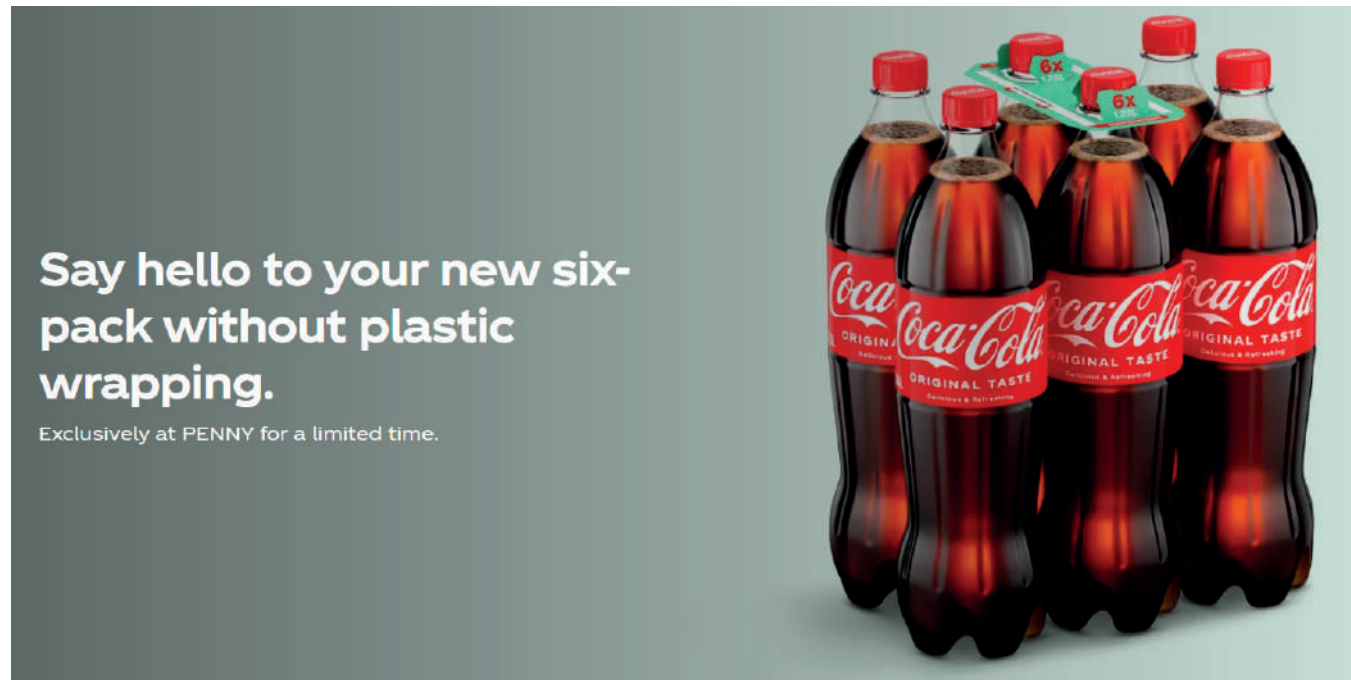
Case study: Coca-Cola

Pilot phase: a new generation of multipacks without plastic film

Coca-Cola and bottling partner Coca-Cola Europacific Partners are trialling a secondary packaging format using adhesive dots and a recyclable cardboard handle, on Coca-Cola Original and Coca-Cola Zero in the 6x1.25 litre format.

In-store communication and packaging graphics explain the promotion to customers in selected Penny stores in Germany. The trial is intended to test feasibility, consumer acceptance, and performance.

“Major brands like Coca-Cola are the trendsetters that shape the path for their category.”



Consumer preferences

Consumers prefer undamaged products cushioned in a safe environment to perfectly-sized packaging.

Importance of sustainability characteristics in packaging, % of respondents indicating extremely or very important

	UK	Germany	France	Italy	Sweden	Average	
Recyclable	77	74	64	67	67	70	Ranked 1–2
Made of recycled content	62	66	56	60	55	60	Ranked 3–5
Compostable	54	58	51	62	48	55	Ranked 6–7
Reusable	61	68	59	61	55	61	Ranked 1–2
Uses less material or lightweight	52	60	46	50	50	51	Ranked 6–7
Low CO ₂ impact	56	62	48	58	51	55	Ranked 3–5
Biobased	41	49	37	42	35	41	Ranked 6–7

Source: McKinsey Packaging Survey, 2025

Retailers invest in logistics

Growth in online retail is driving more secondary packaging designed for two-way trips to allow easy return to the retailer. The packaging must offer the same degree of protection as on the outward delivery.



KEY HIGHLIGHTS

- ▶ **AI** is continuing to shape supply chain optimisation with predictive analytics and process automation
- ▶ **Sustainability** remains a top priority, with focus on reducing environmental impact through circular supply chains
- ▶ **Last-mile delivery** innovations, including drones and autonomous vehicles, are helping meet consumer expectations for faster deliveries
- ▶ **Robotics and automation** in warehouses are increasing productivity and reducing human error. The era of “deliver and forget” for packaging suppliers is over.

Returnable e-commerce packaging

Reusable packaging has the potential to revolutionise the e-commerce market, if it can overcome core challenges



CHALLENGES

- ▶ Cost compared to single-use alternatives
- ▶ Low return rates from consumers. If the packs are too sturdy or attractive, consumers more likely to retain them
- ▶ Functionality (for example, Velcro closures could damage apparel)
- ▶ Cleaning and repair of used packs
- ▶ Difficulties with managing address labels for multiple deliveries (and returns)
- ▶ If they are too fragile or susceptible to contamination, they cannot survive sufficient rotations to justify their expense.

Summary

Growing urgency to align sustainability with performance

The global packaging industry is placing increasing emphasis on improving the environmental sustainability of its products as consumer expectations and regulatory requirements continue to intensify.

Companies are working to reduce material use, adopt recyclable or renewable resources, and lessen overall environmental impact. However, these efforts must be balanced with the essential need for packaging to protect products throughout the supply chain.

In Europe, EU member states are preparing to implement the PPWR over the next five years, aiming to meet the 2030 target for fully recyclable packaging. This regulatory push underscores the growing urgency for innovation that aligns environmental responsibility with reliable packaging performance.

“Sustainability is the number one priority of the global packaging industry. The key will be to strike the correct balance between product protection and sustainability; any changes must not compromise the primary protective function.” [1]

Sources

Smithers Market Reports provide credible, actionable insights, with market data based on primary and secondary research. Our team of industry experts will help solve your strategic and business challenges with incisive market intelligence.



The Future of Digital Print for Packaging to 2030



The Future of Secondary and Protective Packaging to 2030



The Future of Global Flexible Packaging to 2030

Sustainability in Secondary and Protective Packaging is produced
by Smithers in partnership with Packaging Innovations & Empack 2026

Find out more at:

smithers.com/services/market-reports
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