



Personal Care Packaging Market, Global, 2025–2032

Personal Care Packaging is Experiencing Transformational Growth Driven by Shifts in Consumer Behavior, Sustainability Demands, and Innovative Packaging Solutions

**Global Chemicals, Materials & Nutrition
Research Team at Frost & Sullivan**

**How does your Organization Identify and Prioritize
Growth Opportunities?**

**PG9U-86
June 2026**

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Scope and Segmentation

Research Overview

- Personal care packaging is a critical enabler of brand differentiation, product protection, and consumer convenience, ensuring integrity, hygiene, and shelf impact across retail and rapidly expanding eCommerce channels. The industry is undergoing structural transformation driven by premiumization, sustainability commitments, digital influence, and changing consumption patterns across hair care, skin care, oral care, perfumes, deodorants, bath & shower, color cosmetics, and others (baby care, sun care, men's grooming).
- Plastic packaging, such as polypropylene (PP), high-density polyethylene (HDPE), and polyethylene terephthalate (PET), and flexible laminates remain widely used in developing countries such as India, Brazil, Indonesia, Nigeria, and Vietnam because it is affordable, flexible, and suitable for many product types. However, the industry is increasingly adopting recycled materials, mono-material designs, lightweight packs, refill options, and large bottles to meet sustainability goals. Companies like Amcor and AptarGroup are investing in recyclable and innovative dispensing solutions. Glass remains strong in premium segments, while aluminum and paper formats are steadily growing.
- This study considers 2025 as the base year and 2026–2032 as the forecast period, delivering a comprehensive assessment of material mix evolution, regional growth drivers, pack-size dynamics, refill penetration, pricing trends, and competitive positioning within the global personal care packaging ecosystem.

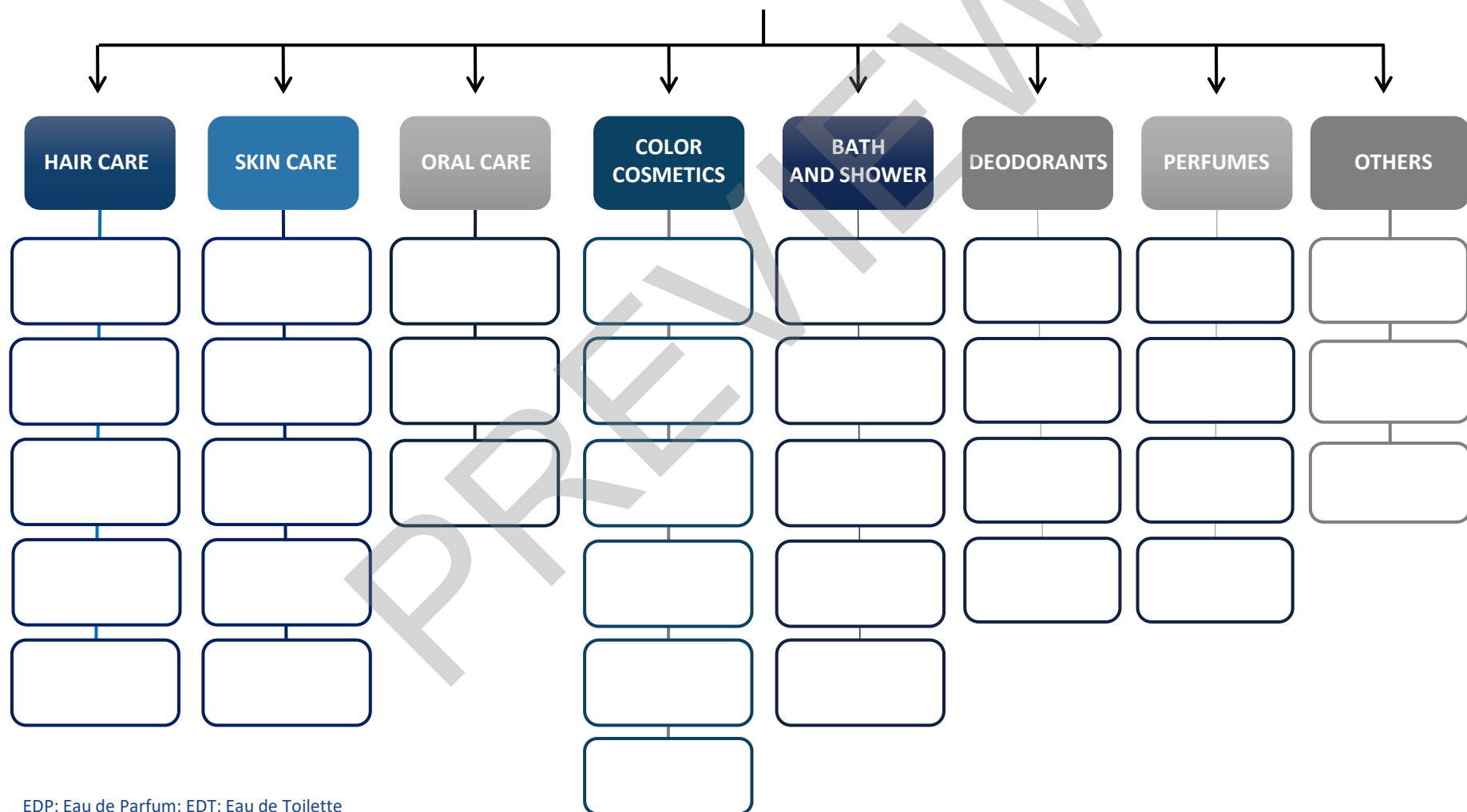
Scope of Analysis

- The objective of this research is to analyze the key packaging types used in personal care applications. It presents an assessment of the status and prospects for primary packaging (retail packaging) in the personal care market and quantifies consumption based on packaging types and applications.
- By 2025, the personal care market had fully recovered from the initial COVID-19 disruption and the second wave in 2021, with demand returning to stable growth across most categories. The industry focus has moved beyond pandemic-driven uncertainty toward long-term structural trends, including sustainability, refill adoption, premiumization, and eCommerce growth. In this environment, a detailed assessment of personal care packaging is essential to track material shifts, pack-format innovation, and changing consumer preferences.
- The key packaging-type-based segments considered in the study include flexible plastics, rigid plastics, paper, metal, and glass, whereas hair care, skin care, oral care, color cosmetics, bath and shower, deodorants, perfumes, and others (sun care, baby care, men's grooming) constitute the key applications-based segments.
- The study analyses the consumption of personal care packaging based on types and applications for four key regional segments: The Americas, Europe, Asia-Pacific (APAC), and The Middle East, Africa, and South Asia (MEASA).
- This study analyzes packaging size shifts and the impact of refills on packaging units for both the base year and the forecast end year.
- The study considers unit shipments and revenues generated in the market from 2022 to 2032. Revenues are recorded at the packaging manufacturer's level. Revenues pertain to the sale of packaging material to personal care product manufacturers or fillers.

Scope	
Geographic Coverage	Global
Study Period	2022–2032
Base Year	2025
Forecast Period	2026–2032
Monetary Unit	US Dollars (\$)
Unit Shipment	Packaging unit (Nos.)
Average Price Representation	US\$ per unit

Segmentation (continued)

Personal Care Packaging: Segmentation by Application, Global, 2025



EDP: Eau de Parfum; EDT: Eau de Toilette

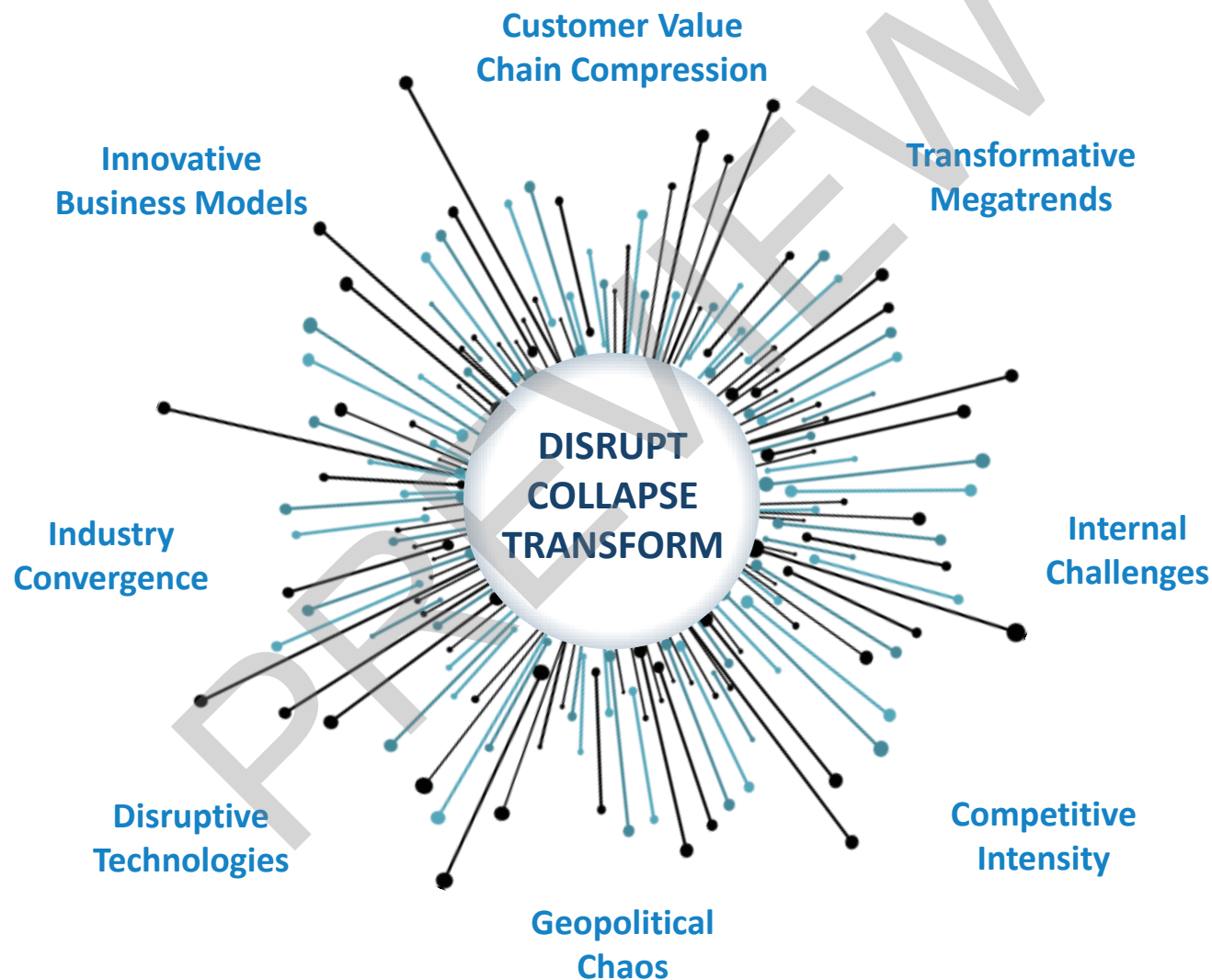


Growth Environment: Transformation in Personal Care Packaging

Is your company prepared to Survive
& Thrive through the coming
Transformation?

Why is it Increasingly Difficult to Grow?

The Strategic Imperative 8™: Factors Creating Pressure on Growth



The Strategic Imperative 8™

Innovative Business Models

A new revenue model that defines how a company creates and capitalizes economic value, typically impacting its value proposition, product offering, operational strategies, and brand positioning

Customer Value Chain Compression

Customer value chain compression as a result of advanced technologies, internet platforms, and other direct-to-consumer models that enables reduction in friction and the number of steps in customer journeys

Transformative Megatrends

Global forces that define the future world with their far-reaching impact on business, societies, economies, cultures, and personal lives

Internal Challenges

The internal organizational behaviors that prevent a company from making required changes

Competitive Intensity

A new wave of competition from start-ups and digital business models that challenge the standing conventions of the past, compelling established industries to re-think their competitive stance

Geopolitical Chaos

Chaos and disorder arising from political discord, natural calamities, pandemics, and social unrest that impact global trade, collaboration, and business security

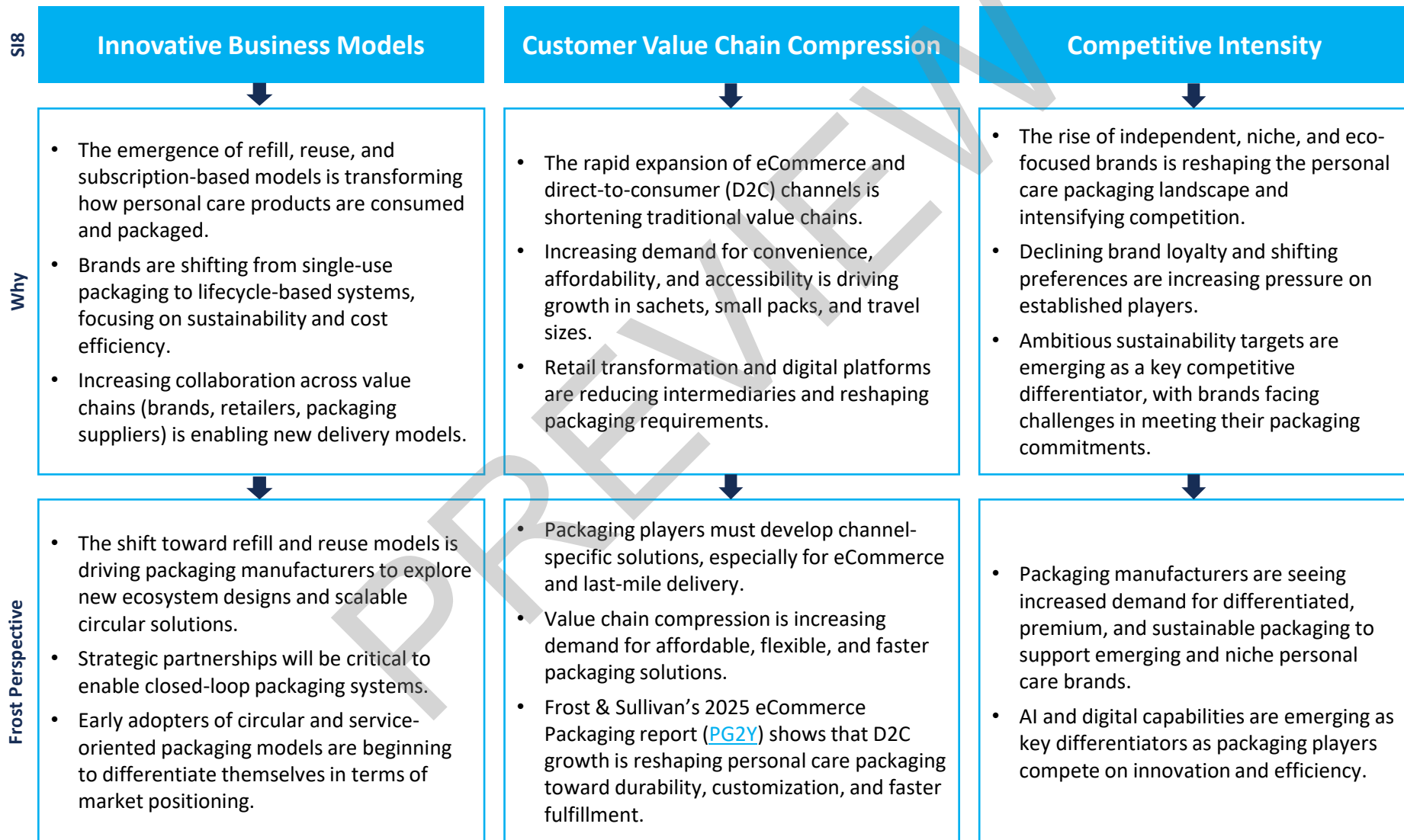
Disruptive Technologies

New, disruptive technologies that are displacing the old, and significantly altering the way consumers, industries, or businesses operate

Industry Convergence

Collaboration between previously disparate industries to deliver on whitespace cross-industry growth opportunities

The Impact of the Top 3 Strategic Imperatives on the Personal Care Packaging Industry



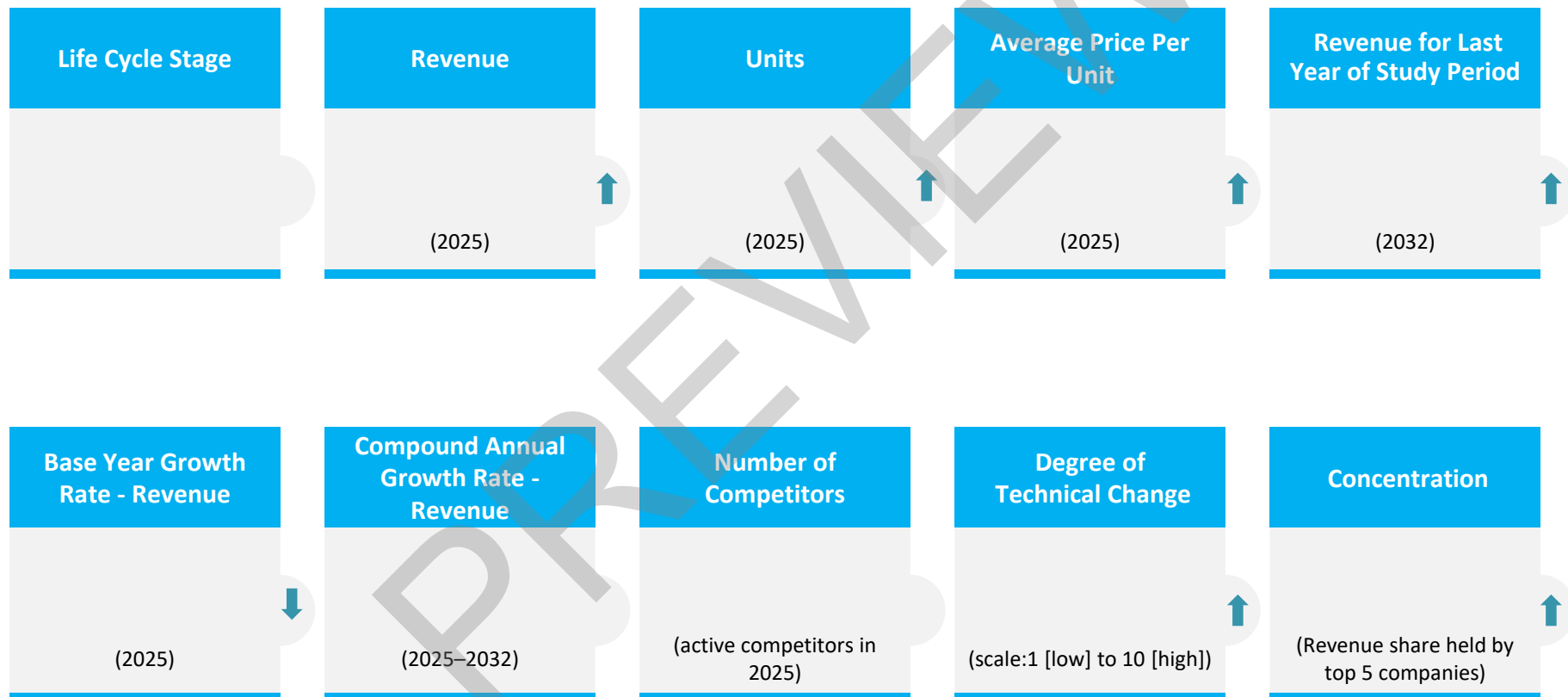


Growth Generator in Personal Care Packaging

What are your organization's Growth Aspirations?

Growth Metrics

Personal Care Packaging: Growth Metrics, Global, 2025



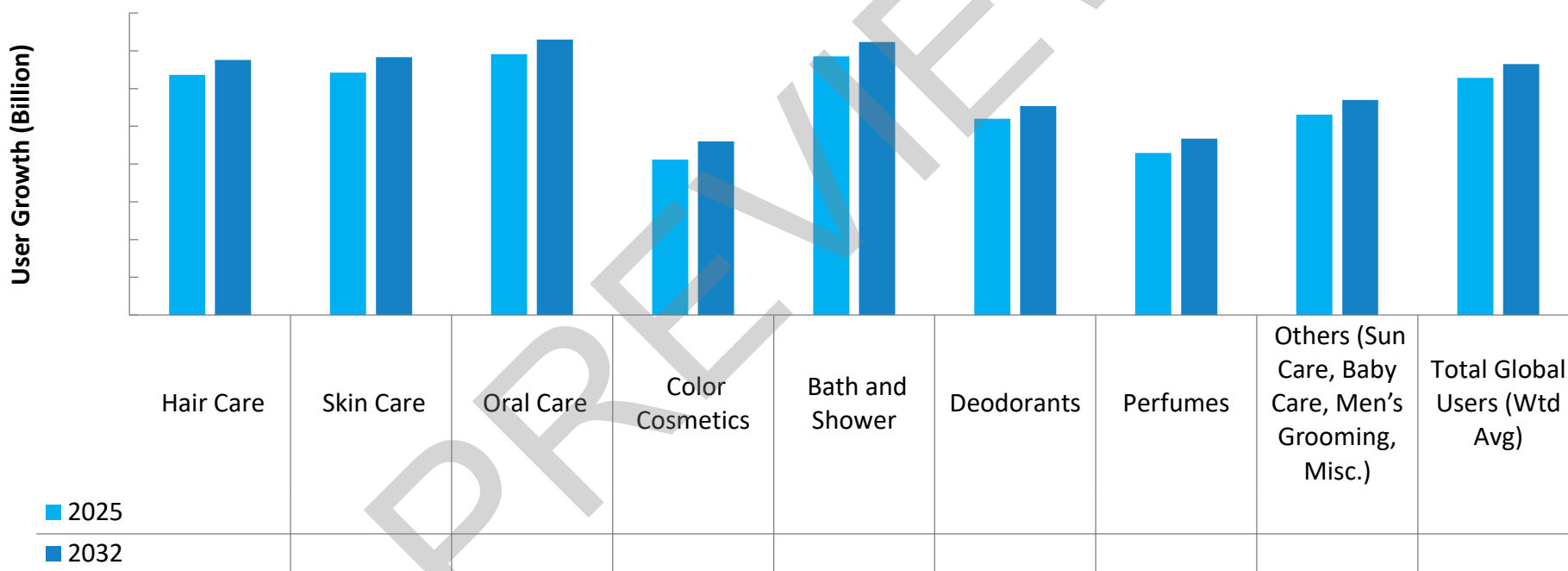
Growth Drivers

Personal Care Packaging: Growth Drivers, Global, 2026–2032

Driver	1–2 Years	3–4 Years	5–7 Years
Personal care product user growth , accelerated by new consumer adoption driven by influencer marketing, social commerce, and rising beauty awareness, is expanding the addressable packaging market.	High	High	Medium
Per capita consumption growth in personal care is rising as existing users increase product usage frequency and diversify their care routines across skincare, haircare, oral care, and hygiene.	High	High	Medium
Population growth is increasing the global consumer base, driving baseline demand for personal care products and their associated packaging across all geographies.	High	Medium	Medium
Packaging size shift across small, medium, and large pack formats are reshaping packaging unit volumes, driven by regional variations in per capita spending power and purchasing behavior with emerging markets favoring smaller, affordable formats and developed markets gravitating toward larger, value-driven sizes.	Medium	Medium	Low
Robust growth in adoption of sustainable packaging products is expected to have a moderate-to-high impact on growth throughout the forecast period.	Low	Low	Medium

Growth Driver Analysis

Personal Care Product User Growth Forecast, Global, 2025 and 2032 CAGR (2025–2032): %



Growth Restraints

Personal Care Packaging: Growth Restraints, Global, 2026–2032

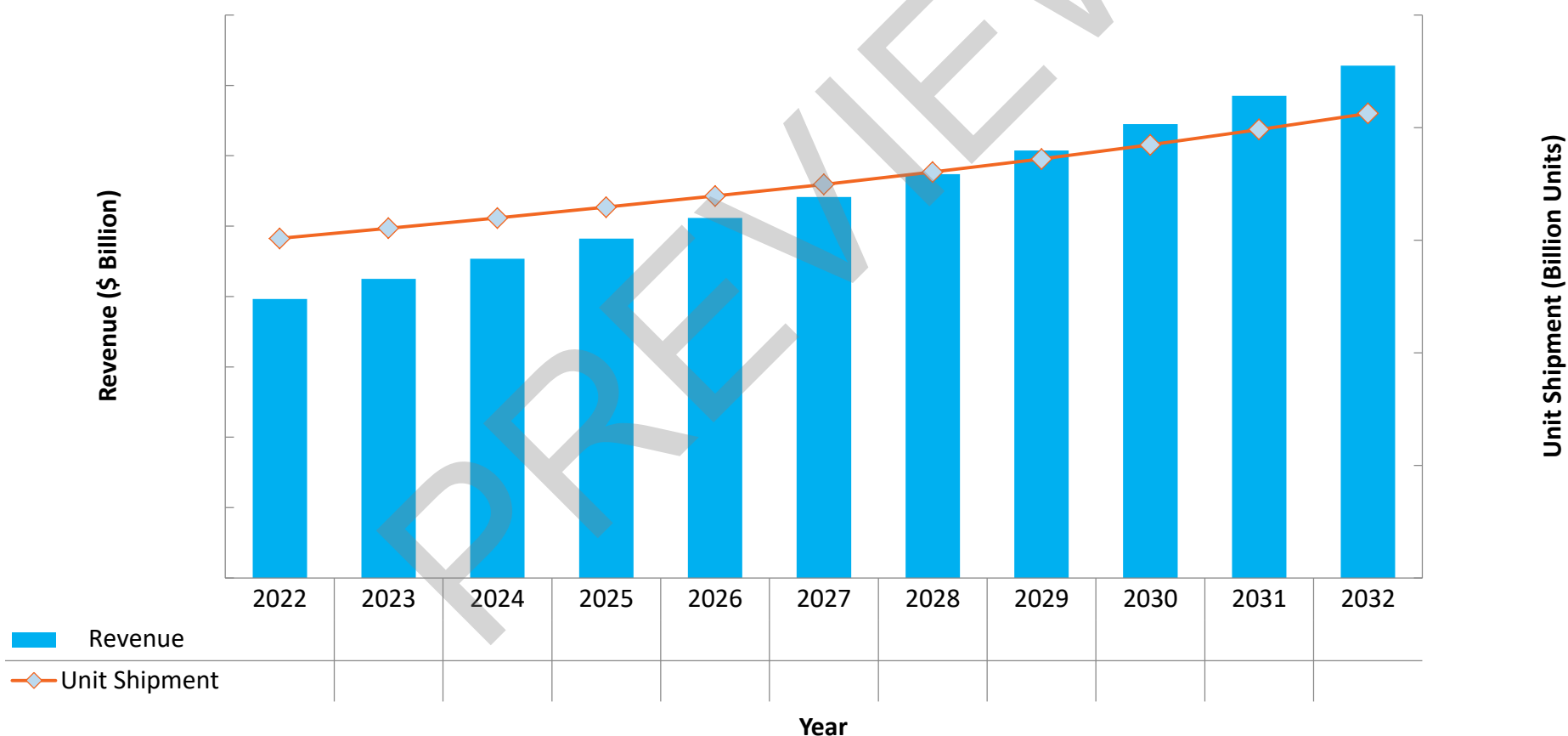
Restraint	1–2 Years	3–4 Years	5–7 Years
Rising regulatory pressure in personal care packaging, especially in developed markets, is enforcing stricter mandates on recyclability, single-use plastic reduction, and extended producer responsibility (EPR). These regulations are driving brands toward lightweighting, mono-material designs, and reduced packaging formats. As a result, overall packaging material intensity is declining, constraining volume growth across the market.	Medium	High	High
Growing adoption of refillable and reusable packaging formats, particularly in developed markets such as North America and Europe, is emerging as a key restraint on overall packaging demand, as brands and consumers increasingly shift away from single-use formats. While this trend is still evolving in developing regions, early adoption in urban and premium segments is beginning to create a gradual impact, which is expected to strengthen over the long term.	Medium	Medium	High

Revenue and Unit Shipment Forecast

Personal Care Packaging: Revenue and Unit Shipment Forecast, 2022–

2032 Revenue CAGR, 2025–2032: %

Volume CAGR, 2025–2032: %



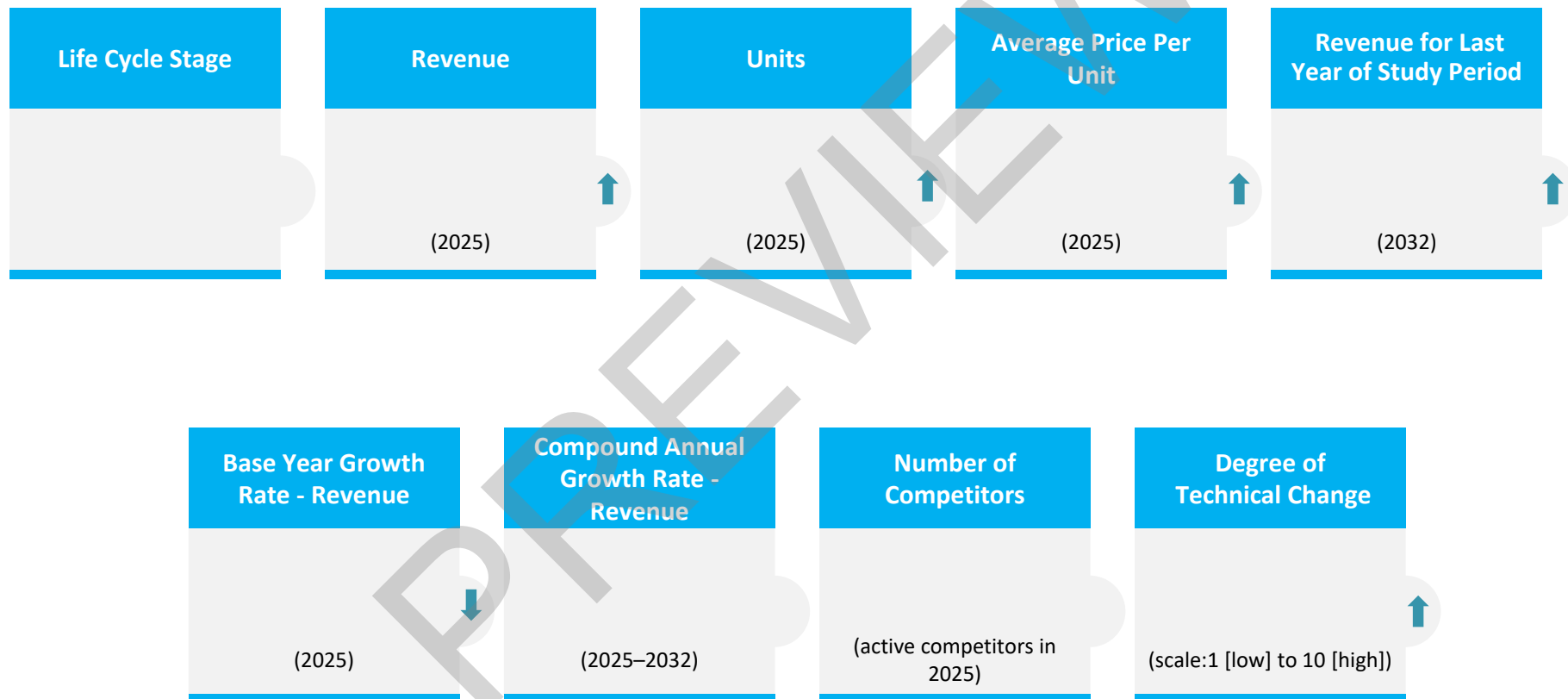


Growth Generator: Hair Care

What are your organization's Growth Aspirations?

Growth Metrics

Hair Care: Growth Metrics, Global, 2025

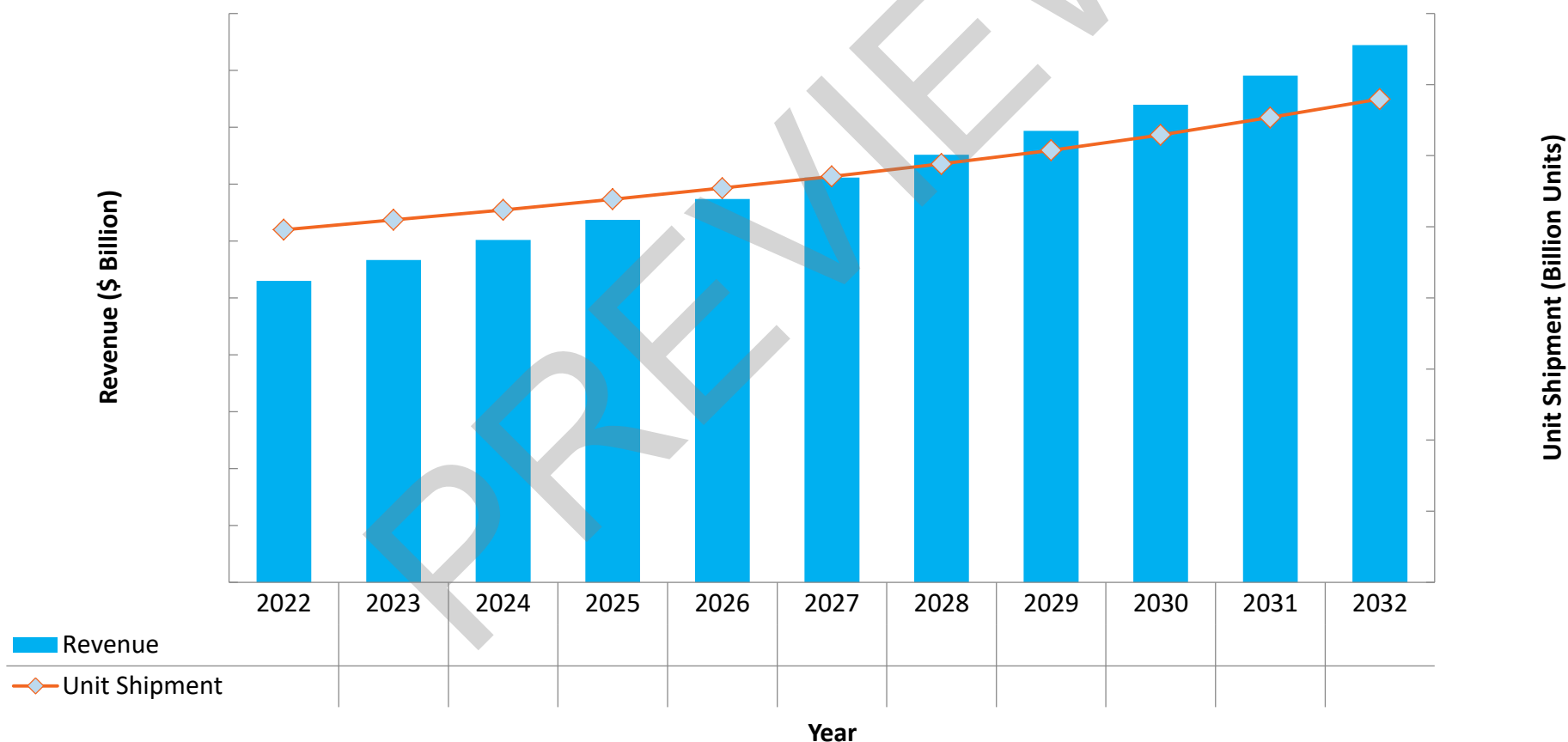


Revenue and Unit Shipment Forecast—Hair Care

Hair Care: Revenue and Unit Shipment Forecast, Global, 2022–

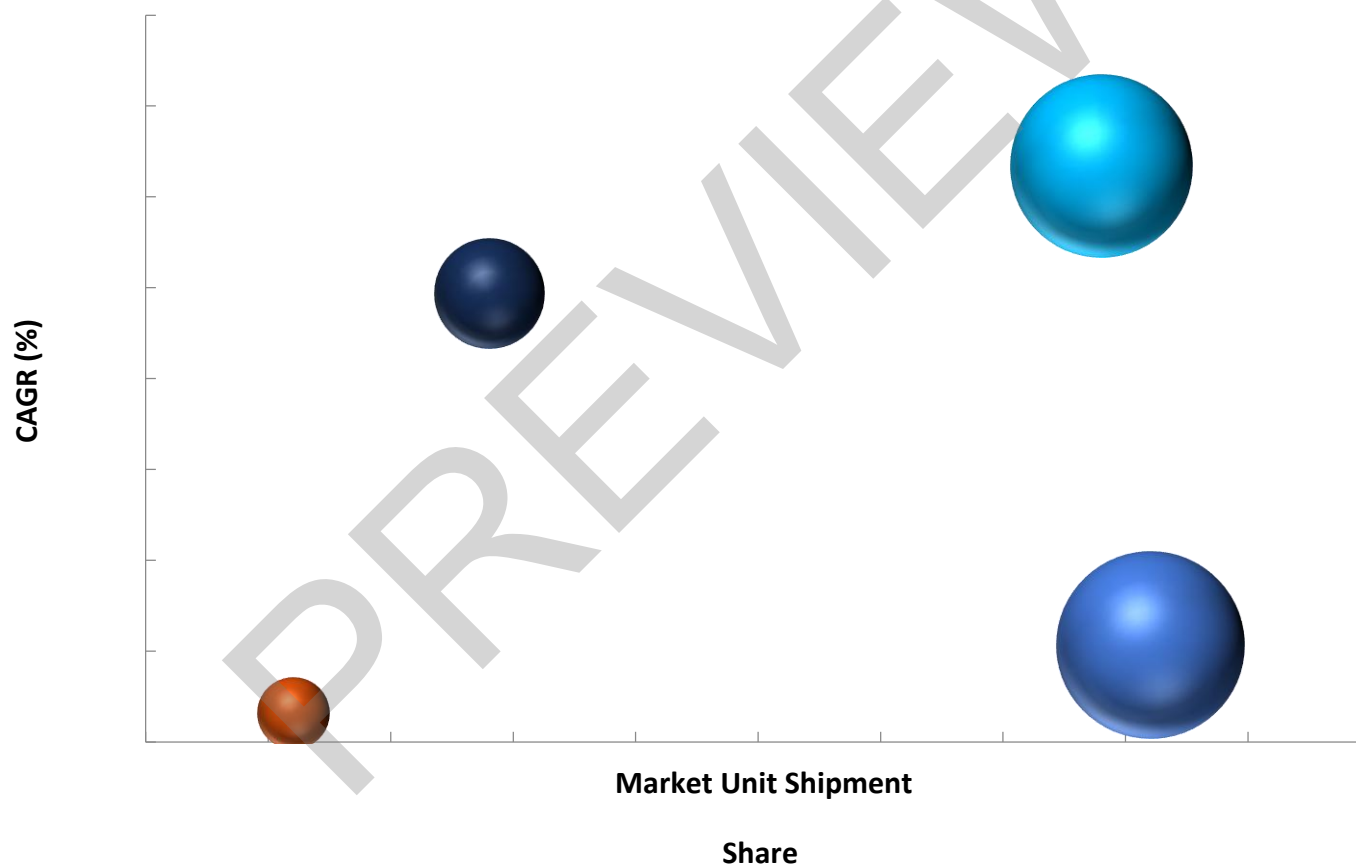
2032 Revenue CAGR, 2025–2032: %

Volume CAGR, 2025–2032: %

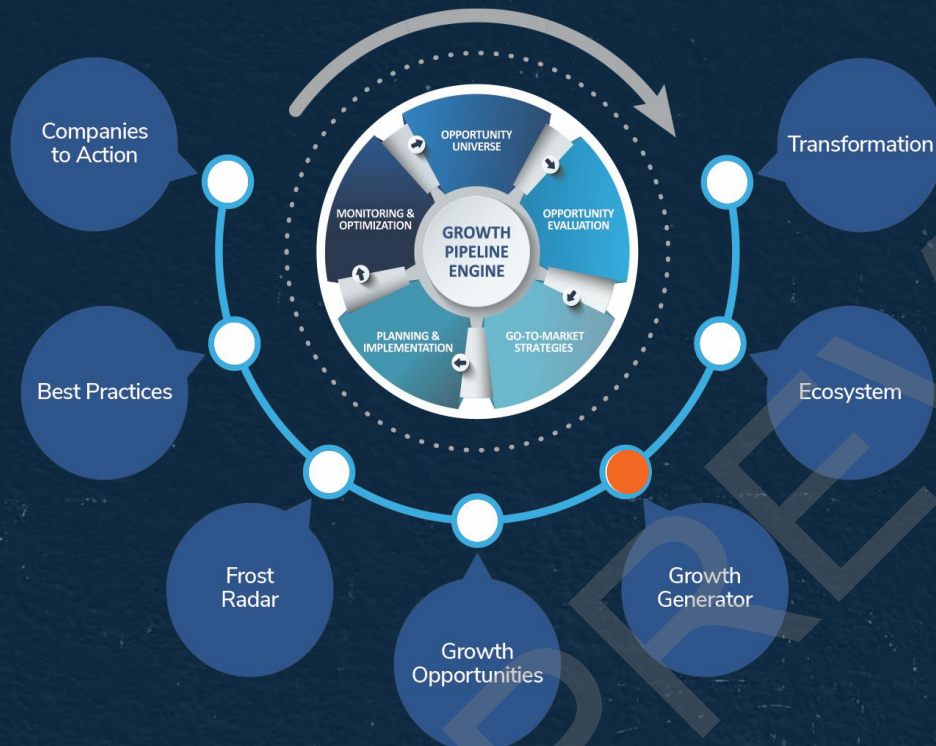


Forecast Analysis by Packaging Type—Hair Care (continued)

Hair Care: Attractiveness Analysis by Packaging Type, Global, 2025–2032



Key: Bubble size represents absolute growth in volume between 2025 and 2032

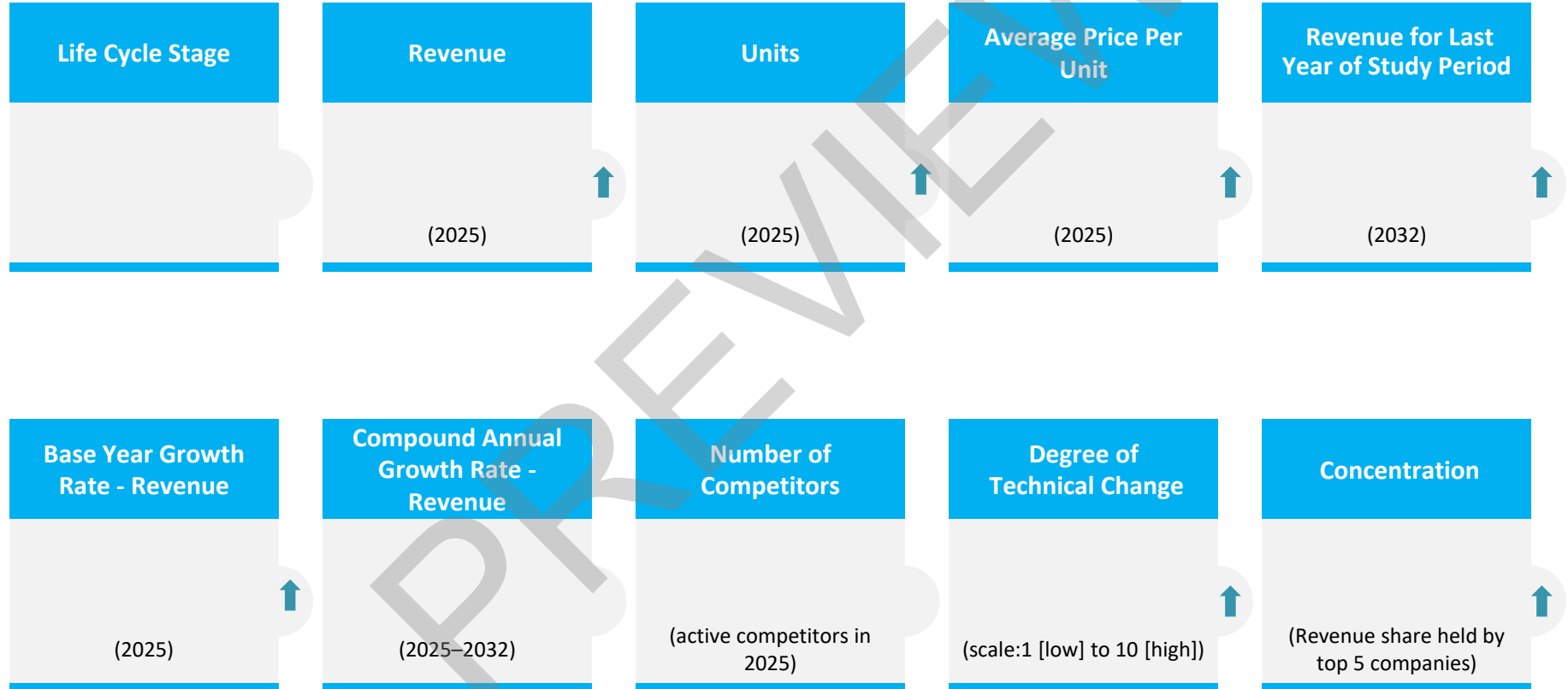


Growth Generator: India

What are your organization's Growth Aspirations?

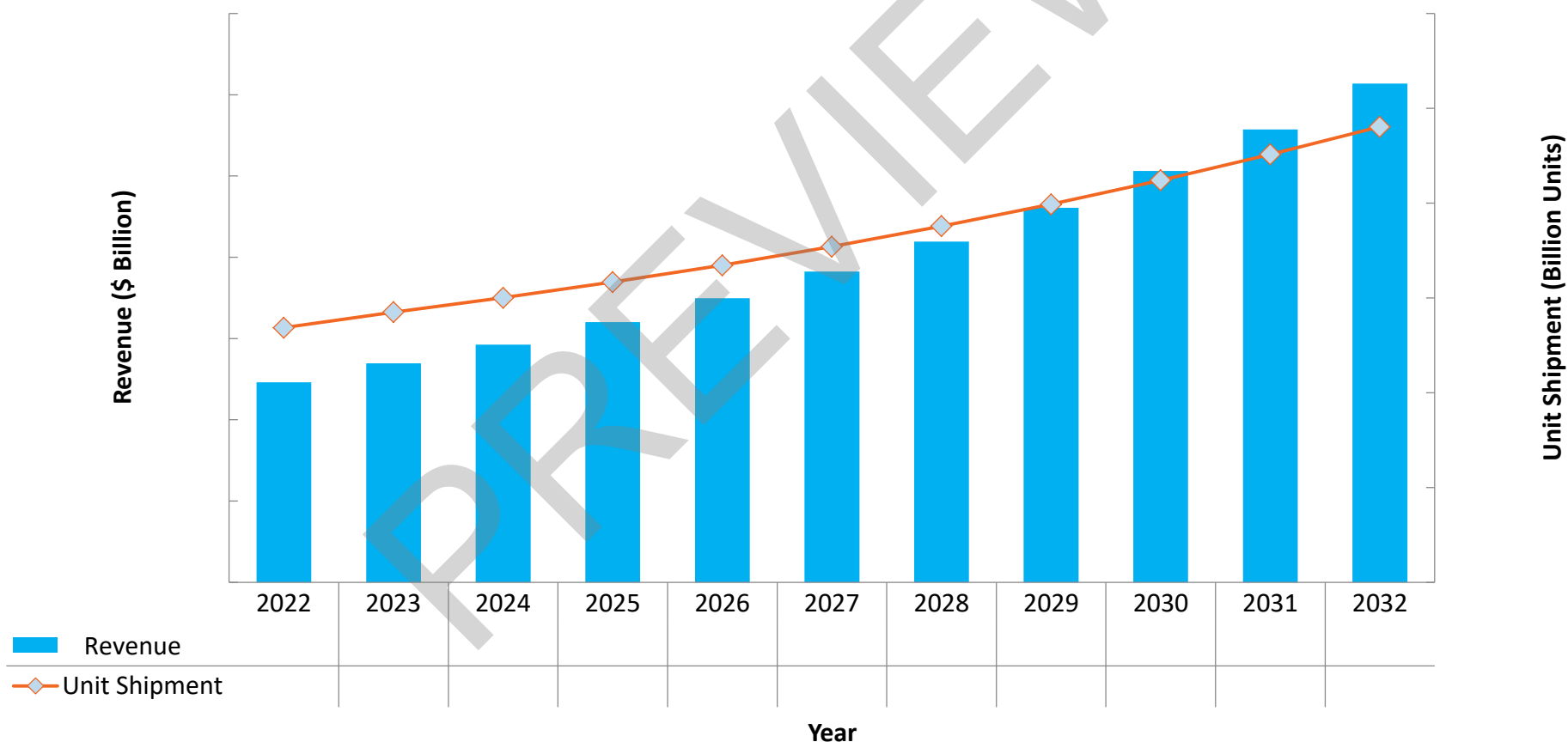
Growth Metrics—India

Personal Care Packaging: Growth Metrics, India, 2025



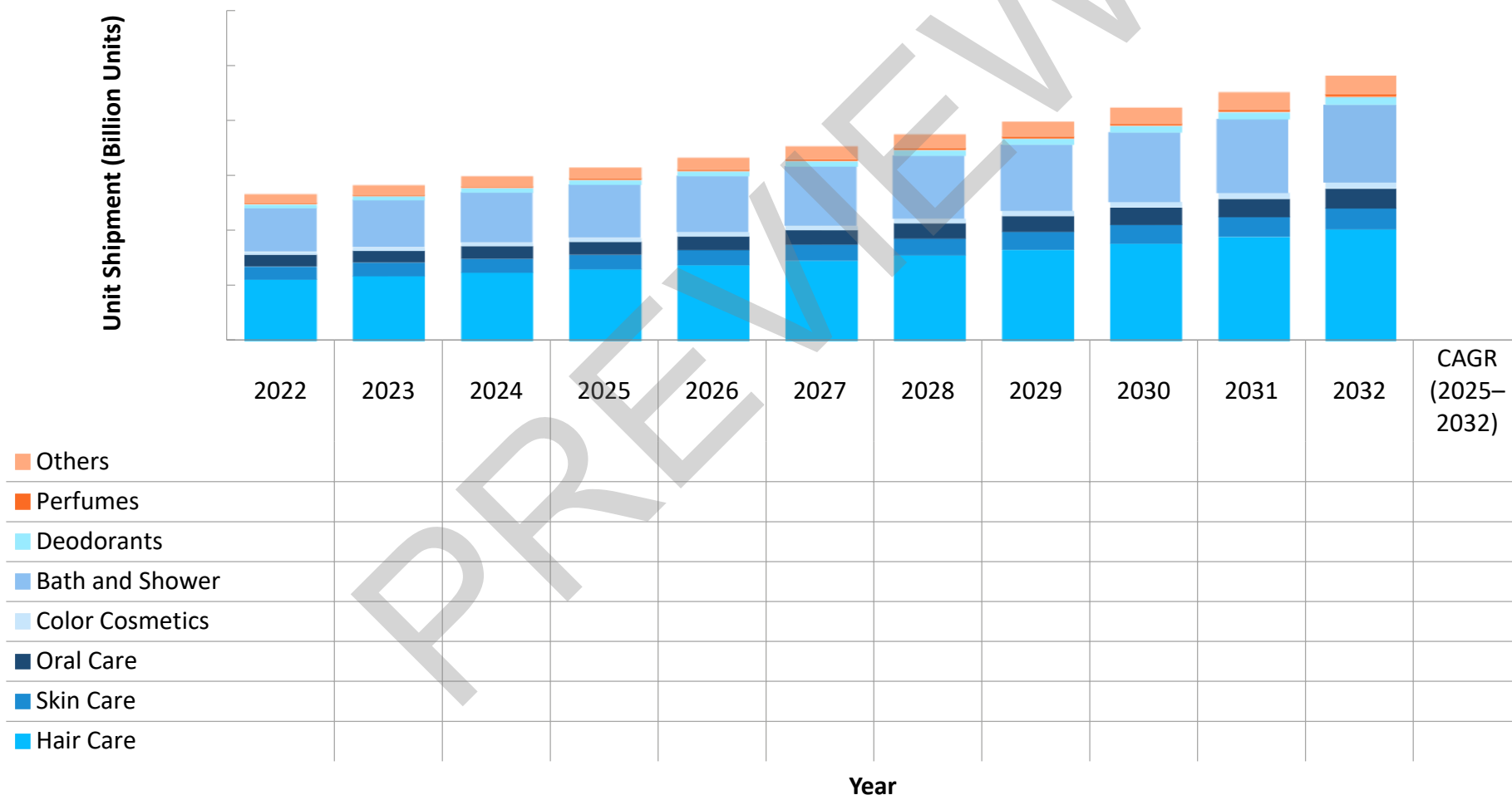
Revenue and Unit Shipment Forecast—India

Personal Care Packaging: Revenue and Unit Shipment Forecast, India, 2022–
2032 Revenue CAGR, 2025–2032: %
Volume CAGR, 2025–2032: %



Unit Shipment Forecast by Application Type—India

Personal Care Packaging: Unit Shipment Forecast by Application Type, India, 2022–2032



Key: Others include sun care, baby care, men's grooming, and miscellaneous.



Growth Opportunity Universe in Personal Care Packaging Market

What Growth Strategies have you embraced to maximize your Growth Potential?

Growth Opportunity 1: Demographic-Driven Personalized & Inclusive Packaging

Opp. Size in 5 Years	Over \$500 M– \$1 B	Relevant End-User Industries for this Growth Opportunity			Applicable Regions
Timeline for Action	1 to 3 Years	 Manufacturing	 Mobility	 Metal & Mining	Central & East Europe
		 Energy & Environment	 Chemicals & Materials	 Information & Communications Technologies	South Asia
		 Electronics & Semiconductors	 Agriculture, Food & Nutrition	 Govt and Public Sector	Western Europe
		 Construction	 Education	 Healthcare & Lifesciences	CIS
		 Consumer	 Aerospace	 Hospitality	North America
		 Retail	 Defense	 Banking & Financial Services	Latin America
GO Base Year	2026				Africa
					Middle East
					Asia-Pacific

Frost & Sullivan has identified 10 Growth Processes that serve as levers for determining and evaluating new Growth Opportunities.



Growth Opportunity 2: Sustainable Materials & Mono-Material Design Innovation

Opp. Size in 5 Years	\$100 M–\$500 M	Relevant End-User Industries for this Growth Opportunity			Applicable Regions
		 Manufacturing	 Mobility	 Metal & Mining	
Timeline for Action	1 to 3 Years	 Energy & Environment	 Chemicals & Materials	 Information & Communications Technologies	Central & East Europe
		 Electronics & Semiconductors	 Agriculture, Food & Nutrition	 Govt and Public Sector	South Asia
		 Construction	 Education	 Healthcare & Lifesciences	Western Europe
		 Consumer	 Aerospace	 Hospitality	CIS
GO Base Year	2026	 Retail	 Defense	 Banking & Financial Services	North America
					Latin America
					Africa
					Middle East
					Asia-Pacific

Frost & Sullivan has identified 10 Growth Processes that serve as levers for determining and evaluating new Growth Opportunities.

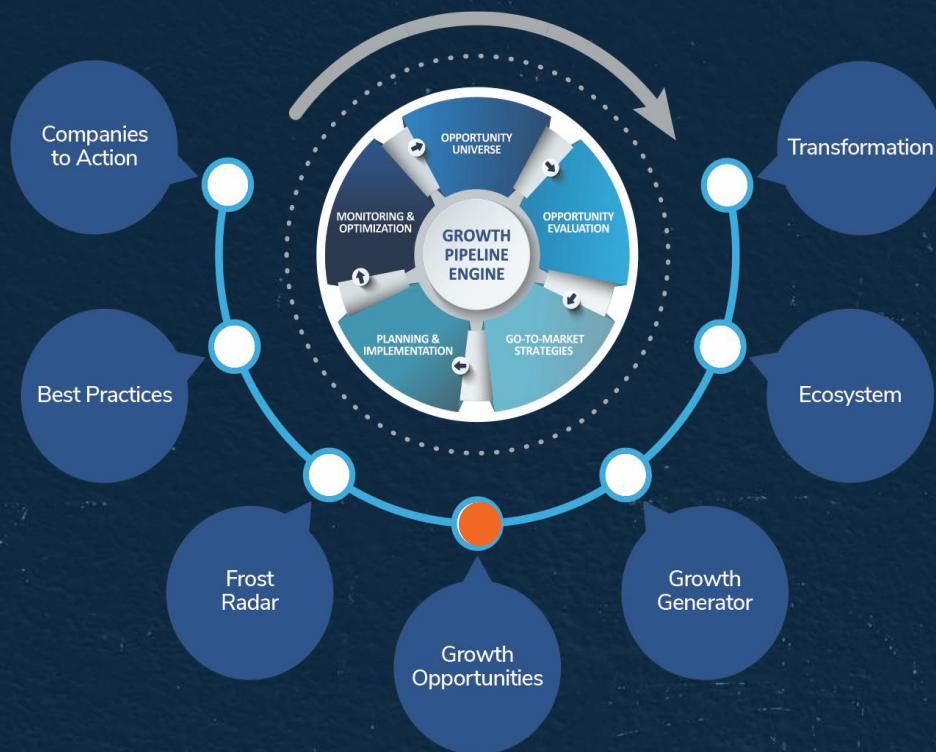
Growth Processes					
	Customer & Branding	Distribution Channel	Geographic Expansion	Vertical Market Expansion	Competitive Strategy
					
	Strategic Partnering	Product Development	Mergers & Acquisitions	Product Launch	Technology & IP

Growth Opportunity 3: Smart, Functional, & Premium Packaging

Opp. Size in 5 Years	Over \$500 M–\$1 B	Relevant End-User Industries for this Growth Opportunity			Applicable Regions
		 Manufacturing	 Mobility	 Metal & Mining	
Timeline for Action	1 to 3 Years	 Energy & Environment	 Chemicals & Materials	 Information & Communications Technologies	Central & East Europe
		 Electronics & Semiconductors	 Agriculture, Food & Nutrition	 Govt and Public Sector	South Asia
		 Construction	 Education	 Healthcare & Lifesciences	Western Europe
GO Base Year	2026	 Consumer	 Aerospace	 Hospitality	CIS
		 Retail	 Defense	 Banking & Financial Services	North America
					Latin America
					Africa
					Middle East
					Asia-Pacific

Frost & Sullivan has identified 10 Growth Processes that serve as levers for determining and evaluating new Growth Opportunities.

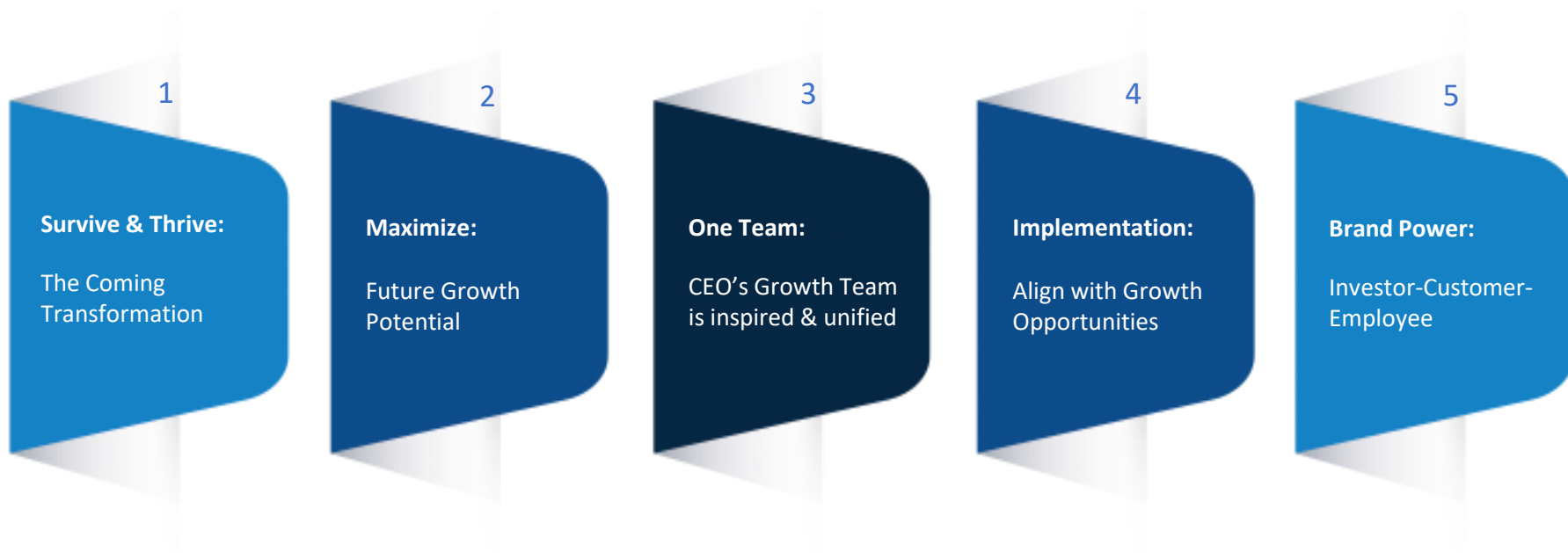
Growth Processes					
	Customer & Branding	Distribution Channel	Geographic Expansion	Vertical Market Expansion	Competitive Strategy
					
	Strategic Partnering	Product Development	Mergers & Acquisitions	Product Launch	Technology & IP



Appendix & Next Steps

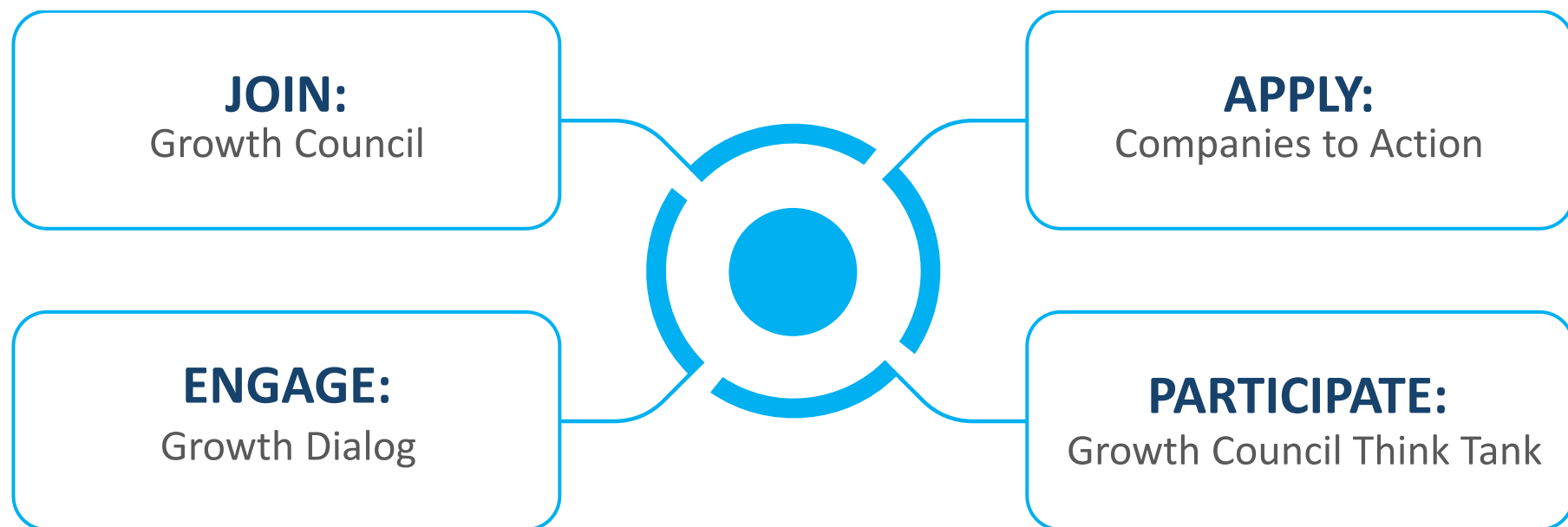
How does your organization identify and prioritize Growth Opportunities?

Benefits and Impacts of Growth Opportunities



Which of these benefits would be most important to your Investor-Customer-Employee?

Next Steps



Does your current system support rapid adaptation to emerging opportunities?

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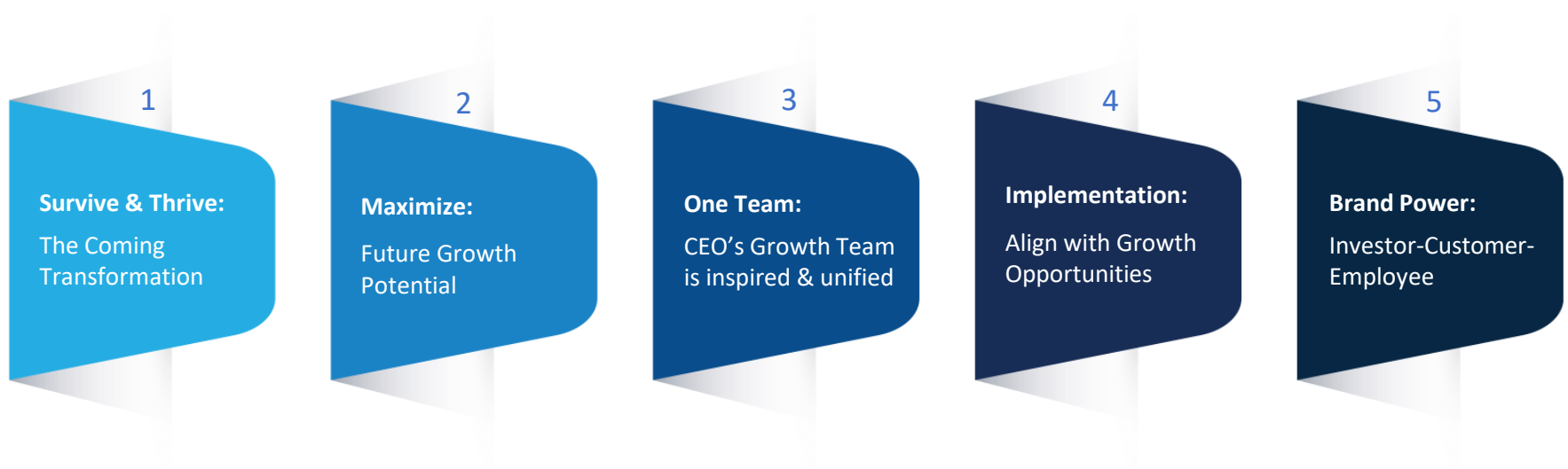
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