

February 2026, sector snapshot

The packaging sector in Catalonia

The packaging sector in Catalonia: sector snapshot

ACCIÓ

Government of Catalonia



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Carried out by

Strategy and Competitive Intelligence Unit of ACCIÓ
Cluster Development

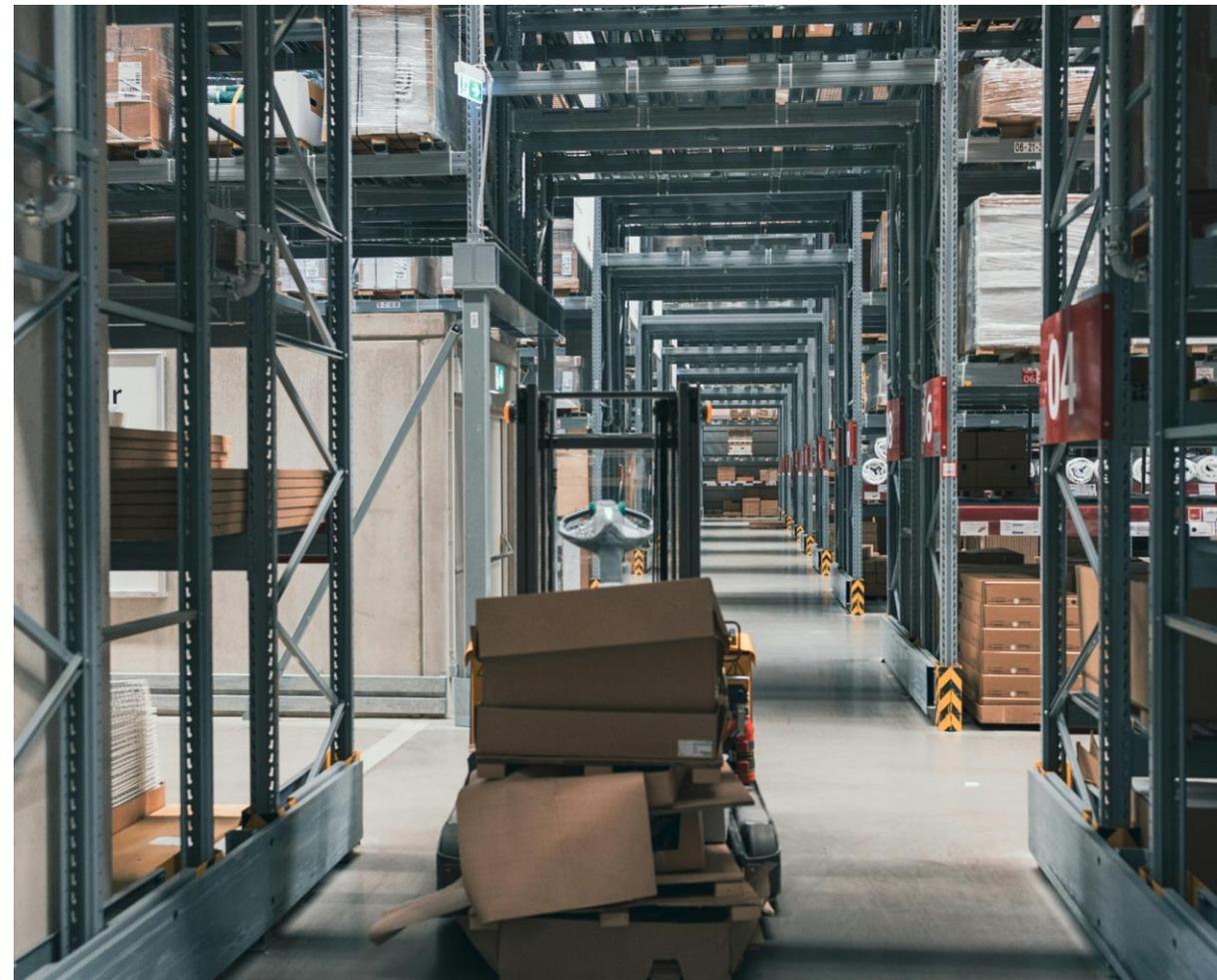
Collaboration

Packaging Cluster
Business Strategy Unit

Barcelona, February 2026

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The packaging sector in Catalonia

1. Executive summary

The packaging sector is a steadily growing market on a global scale



The global market for packaging reached US\$1.28 trillion in 2025

- The packaging sector will be maintaining a **sustained growth trajectory**, with a CAGR of 3.16% between 2025 and 2035.
- Asia is the **main consumer of packaging on a global scale**, while North America leads in per capita consumption.
- Plastic will continue to occupy a **predominant position in a transitional environment**.
- Food **remains the main end market**, but health and animal nutrition are recording the fastest growth.

The EU has attracted more than €2.3 billion of FDI in the packaging sector during the period 2020-2025

- The EU has registered **132 FDI projects**, with **investment of €2.31 billion** and the **creation of 6,217 jobs** (2020-2025).
- Spain has been the **2nd-highest destination country for this FDI** in terms of volume of invested capital, behind Germany.
- The USA has been the main investor in the EU, with **more than double the capital invested** than the 2nd country in the ranking.
- Among the largest **investment companies** in terms of volume of capital invested, Amcor, CCL and Footprint stand out.

8 trends that will shape the global food packaging sector

- High concentration in the sector.
- Market polarisation.
- Sustainability as a commodity.
- Competition for access to recycled materials.
- More complex demand.
- Comprehensive use of AI and digital tools.
- Competition from low-cost countries is growing.
- New business models.

Source: ACCIÓ

More than 850 companies make up the packaging sector in Catalonia



The packaging sector in Catalonia has a turnover of more than €12.2 billion and employs more than 36,500 people

- In Catalonia, a total of **855 companies** in packaging generate a **turnover of €12.23 billion** and **employ 36,512 people**.
- **Suppliers of packaging manufacturers** represent almost a fifth of the sector's turnover (14.49%).
- **Packaging and container manufacturers** represent more than 70% of the sector (605 of the 855 companies).
- Most **packaging machinery companies** grow at rates greater than 5%, above the sector average.

Catalonia has a powerful packaging ecosystem that drives the entire sector

- The Packaging Cluster is a **reference entity in innovation, competitiveness and business development** within the sector.
- The extensive Catalan network of **technology centres and technology transfer agents** is a key ally for the sector.
- ESDI, La Salle and the UPC are some of the centres that offer **training related to the packaging sector** in Catalonia.
- Salaet, Enplater Group, Font Packaging Group and Comexi are some **Catalan success stories linked to the sector**.

Between 2020 and 2025, Catalonia was the top region in Spain in number of FDI projects in the packaging sector.

- Catalonia captured **7 FDI projects**, with **€90.09 million in investment** and **213 jobs created** (2020-2025).
- With 5.30% of the total, Catalonia was the **2nd top EU region in number of FDI projects** in the packaging sector.
- In the five-year period 2021-2025, Catalonia was the **top exporting and importing region in terms of packaging in Spain**.
- 20 countries offer **international business opportunities related to packaging** for Catalan companies.

Source: ACCIÓ

The packaging sector in Catalonia

2. Overview of the packaging sector

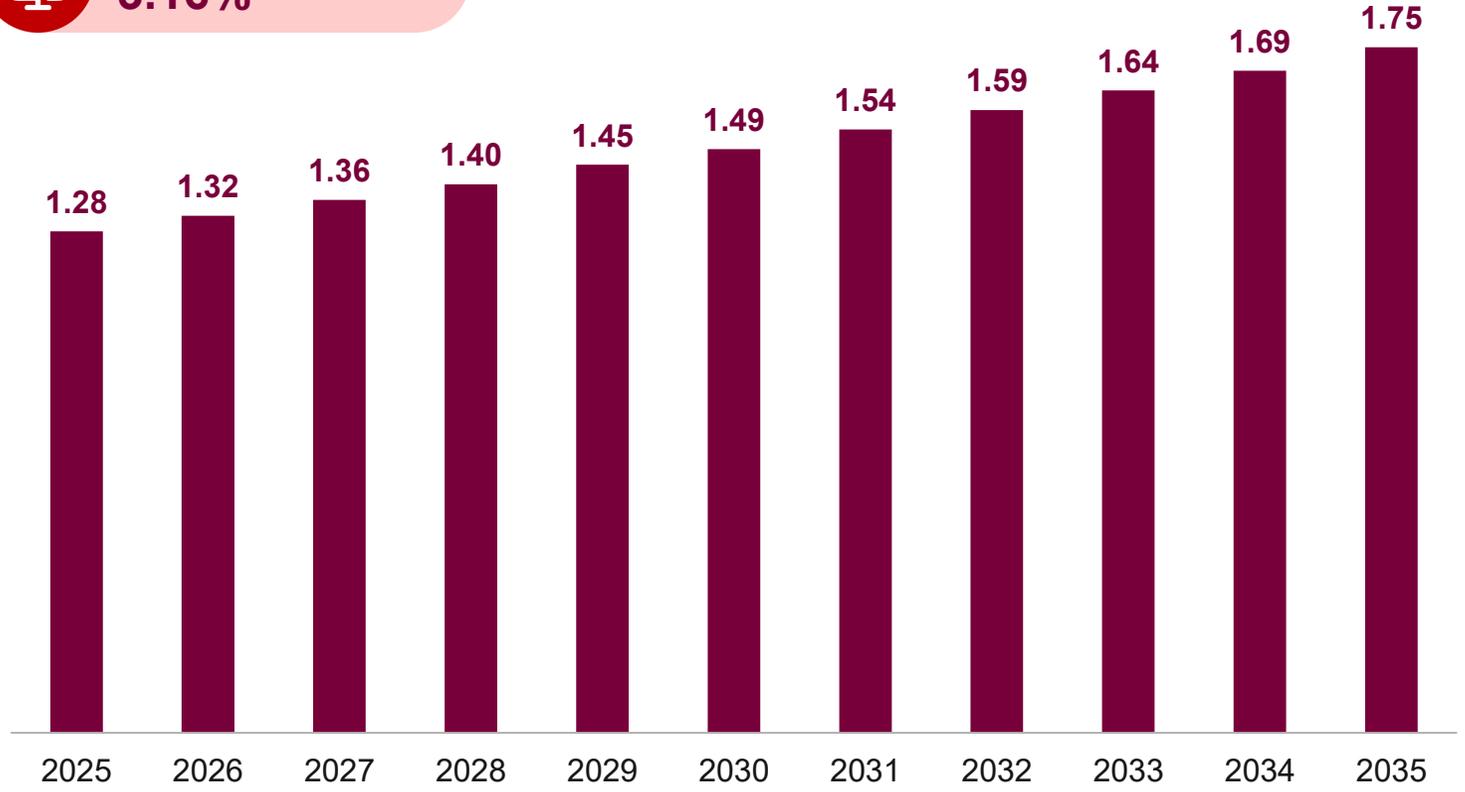
The packaging sector will maintain a sustained growth trend until 2035

Market with **constant growth on a global scale** (the last 10 years and maintaining forecast until 2035).



Estimated evolution of the size of the global market for packaging (US\$ trillion)

 CAGR (2025-2035)
3.16%



Source: ACCIÓ, based on "The Future of Global Packaging to 2030", Smithers, 2025; "Packaging Market Size", Towards Packaging, 2025

Asia leads the world in consumption of packaging and North America in per capita consumption ⁹

Consumption of packaging on a global scale

Asia is the **top consumer of packaging** and shows an **upward trend** (driven by a large and growing population and rising disposable incomes)

- **Asia** is the world's largest consumer of packaging, with 40.5% of the total in 2025, compared to 38.4% in 2015.
- It is followed by **North America**, with 24.8%, and **Western Europe**, with 18.4%.
- Market evolution (vs. 2015): **North America is gaining weight** (+2.5%), while **Western Europe is shrinking** (-2.4%).

Global demand for packaging, 2025



Per capita consumption of packaging on a global scale

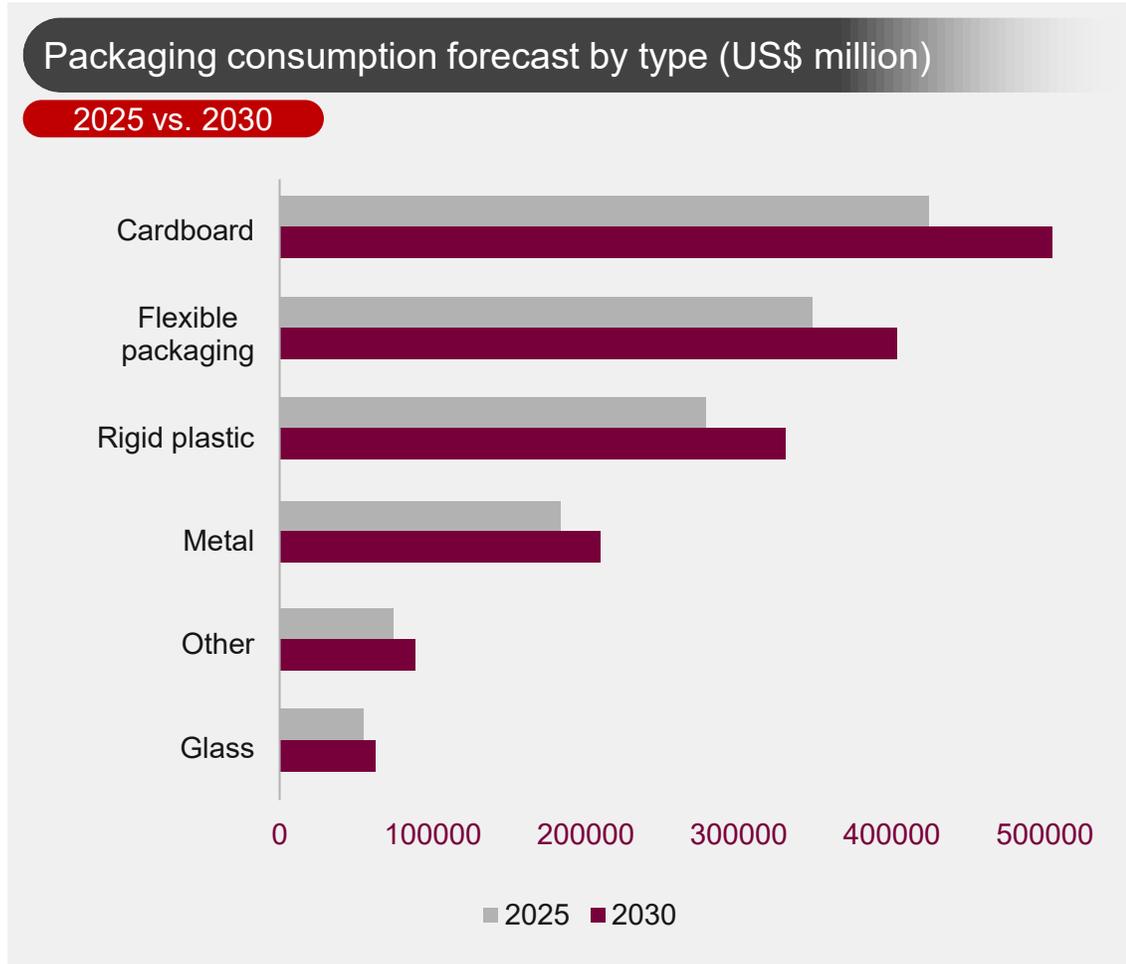
North America is the **world's leading market in packaging consumption per capita** and reaches 240 kg/year per person.

- Europe and the USA have high consumption, but also the **strictest regulations**.
- The difference between continents reflects **income levels, urbanisation and penetration of modern trade channels**.
- Africa has the lowest consumption in the world (30-40 kg/person/year), but will be the **region with the most structural growth potential** in the coming decades.

Continent	Packaging consumption per capita (kg/person/year)
North America	240 kg
Europe	190 kg
Asia-Pacific	80-110 kg
Latin America	80-100 kg
Africa	30-40 kg

Source: ACCIÓ, based on "The Future of Global Packaging to 2030", Smithers, 2025

Changes occur in the use of packaging materials according to functionality and sustainability aspects such as recyclability or weight and their impact on carbon emissions

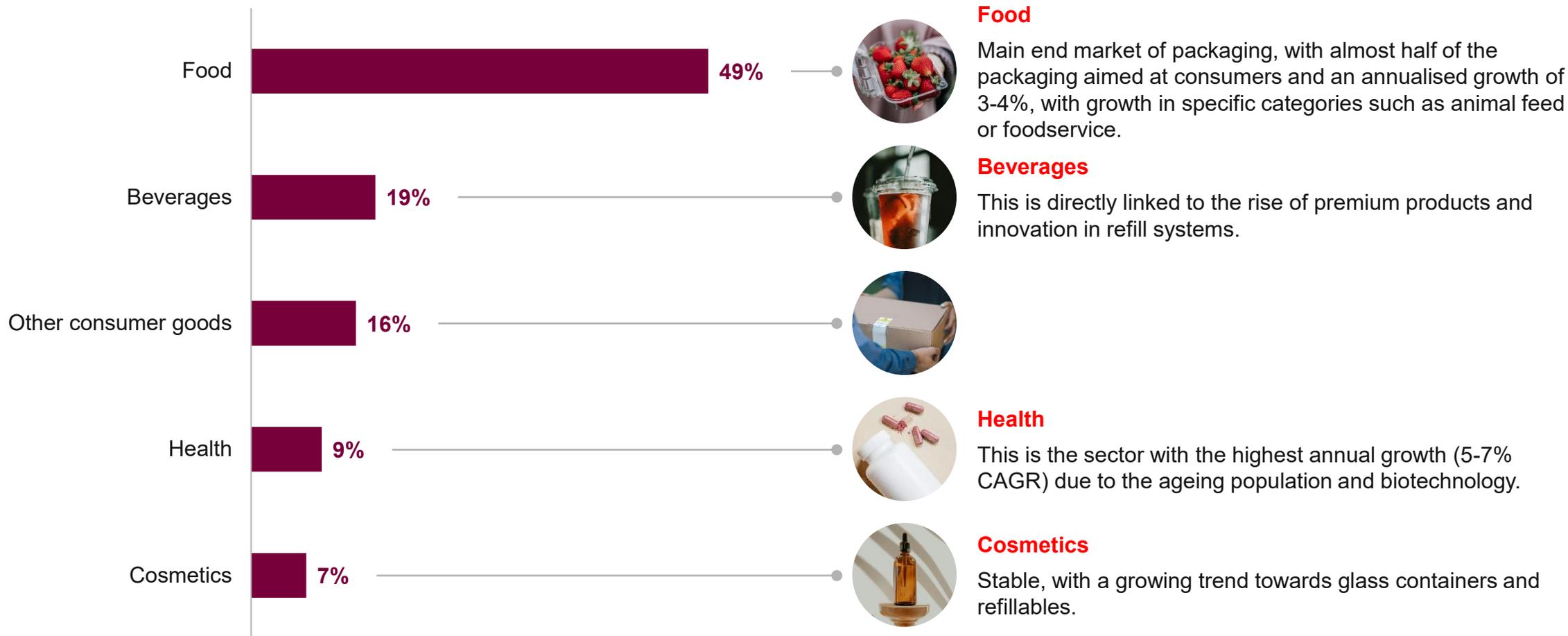


Changes in the use of materials in different packaging categories

Material Shift	Example product category	Packaging shift from	Change in percentage points	Packaging shift to
Plastic to paper	Frozen ready meals	Plastic trays	-2 pp ▶	Paper trays
	Packaged bread	Plastic bags and pouches	-9 pp ▶	Paper bags and pouches
Rigid to flexible	Shelf-stable seafood	Metal cans	-5 pp ▶	Mixed bags and pouches
	Powdered infant formula	Paper rigid containers	-5 pp ▶	Mixed pouches/ paper folding cartons
Metals to others	Shelf-stable soups	Metal cans	-5 pp ▶	Plastic bottles/jars, paper cartons
	Cola carbonates	Metal cans	-3 pp ▶	Plastic bottles

Source: ACCIÓ, based on "The Future of Global Packaging to 2030", Smithers, 2025; "The Future of Process Industries", BCG, 2025

Food accounts for a predominant part of global consumption of packaging



Source: ACCIÓ, based on "Consumer Packaging Market", Fortune Business Insights, 2025; "Sustainability in Packaging", McKinsey & Company, 2025

Health and animal nutrition are the fastest growing segments



	Health	Pet food	Foodservice	Liquids	Beauty and wellness	Protein
Growth levers	Anti-counterfeiting	Humanisation and premiumisation	On-the-go, convenient consumption	Organic food safety	Social media influence	Food safety and fresh protein consumption
	Ageing population and increased access	Demand for eco-friendly products	Affordability and accessibility	More sustainable formats (recyclability, PCR, lightweighting)	Personalisation	Customer-oriented automation
	Regulatory expertise	Organic, natural and fresh pet food	More sustainable formats (fibre, recyclability, PCR)	Convenient consumption	More sustainable formats (fibre, recyclability, PCR, refillable)	More sustainable formats (recyclability, PCR)
Estimated average growth 2023-2028e	5-7%	5-6%	4-5%	3-4%	3-4%	3-4%

Source: ACCIÓ, from "Amcor – Investor Presentation", Amcor, 2025

The EU registered €2.3 billion of FDI in the packaging sector during the period 2020-2025

Between 2020 and 2025, the EU registered 132 FDI projects in the packaging sector, which came to more than €2.3 billion in investment and the creation of more than 6,200 jobs. Spain was the second-highest destination country for this FDI in terms of volume of invested capital (€449.41 million), only behind Germany (€602.34 million).

FDI in the packaging sector in the EU, 2020-2025

132 projects

€2.31 billion of investment

6,217 jobs created

Countries of origin by capex

- 1 USA | €702.03 million
- 2 Switzerland | €267.27 million
- 3 Germany | €160.39 million
- 4 Canada | €157.86 million
- 5 Japan | €137.88 million

Destination countries by capex

- 1 Germany | €602.34 million
- 2 Spain | €449.41 million
- 3 France | €310.98 million
- 4 Poland | €259.12 million
- 5 Austria | €144.31 million

Main companies by invested capital, 2020-2025



Note: 2025 data includes the period from January to September

Source: ACCIÓ, based on fDi Markets, 2025

The packaging sector in Catalonia

3. The packaging sector in Catalonia

The packaging sector in Catalonia

3.1. Key figures for the packaging sector in Catalonia

Definition of the packaging sector in Catalonia

From design to recycling — the **protection, transport, communication, sustainability and optimal use** of the products is guaranteed.

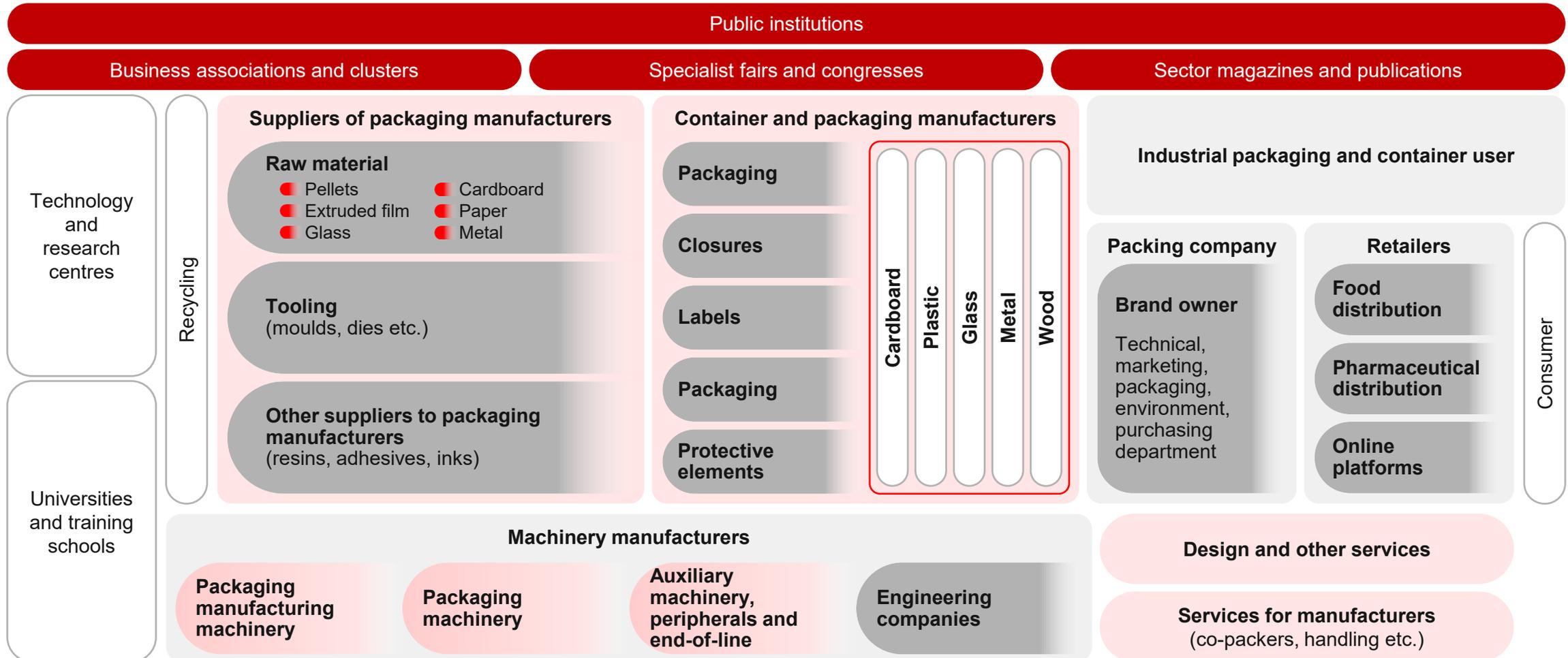
Mapping scope

- 1 Packaging, closure and labelling companies.
- 2 Packaging and container manufacturing machinery, as well as peripheral or end-of-line machinery.
- 3 Companies that supply raw materials or other necessary materials.
- 4 Companies that offer co-packing or handling services.
- 5 Graphic or industrial design packaging companies.



Source: ACCIÓ

Value chain of the packaging sector in Catalonia (I)



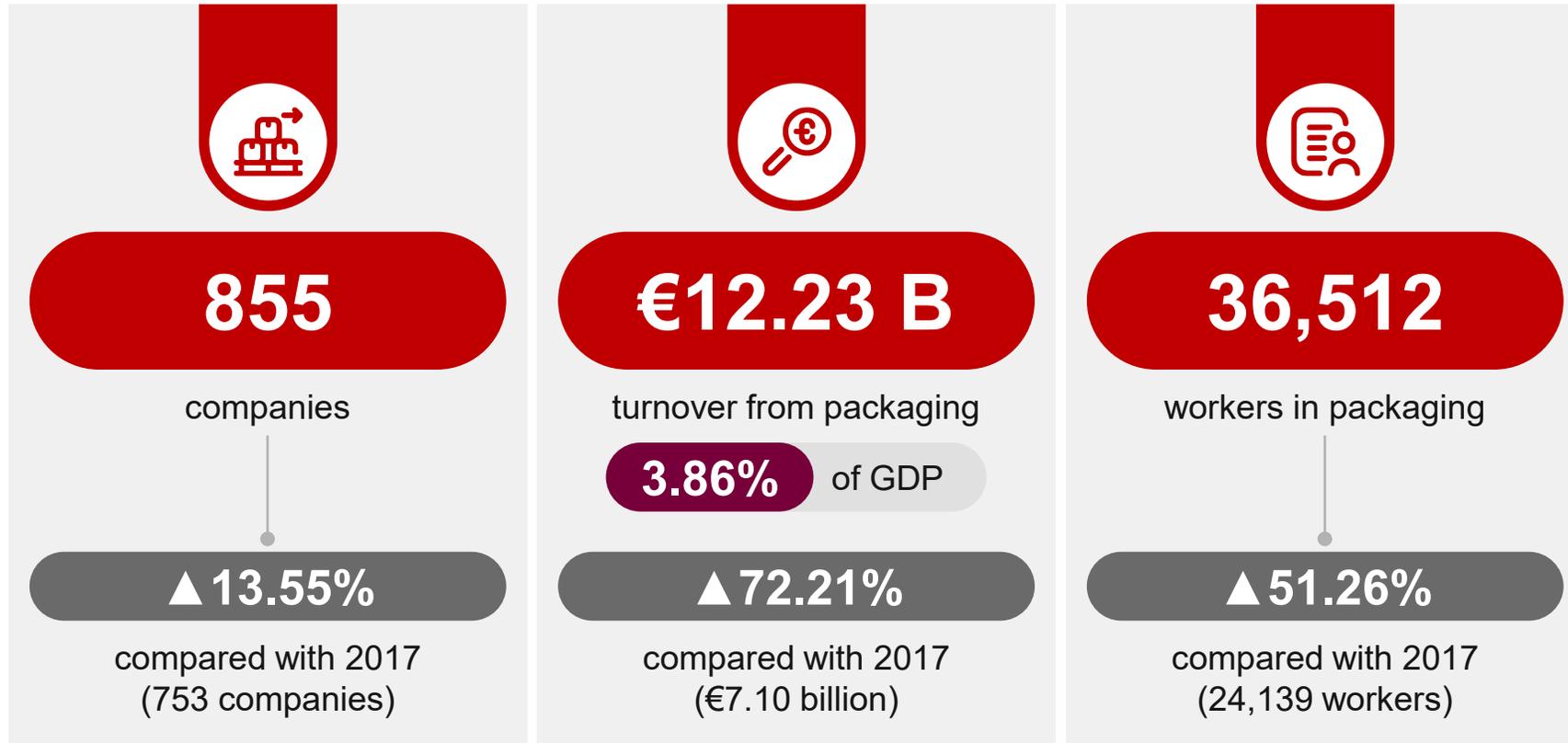
Note: The segments shaded in light red correspond to those included in the mapping of the sector in Catalonia

Value chain of the packaging sector in Catalonia (II)



Note: Partial representation with the purpose of illustrating the companies from the different segments that make up the packaging sector in Catalonia
Source: ACCIÓ

Key figures for the packaging sector in Catalonia (I)



Note 1: Turnover and employee data from the last year available, mostly 2023 and 2024

Note 2: The employee data in 2017 calculated total employment (42,114) without applying the percentage dedicated to packaging. To facilitate comparison with the year 2024, this figure has been adjusted to the proportional part of packaging: 24,139 workers

Source: Own work based on the construction and analysis of a list of identified companies belonging to the sector with data available in the Trade and Companies Register from the SABI application

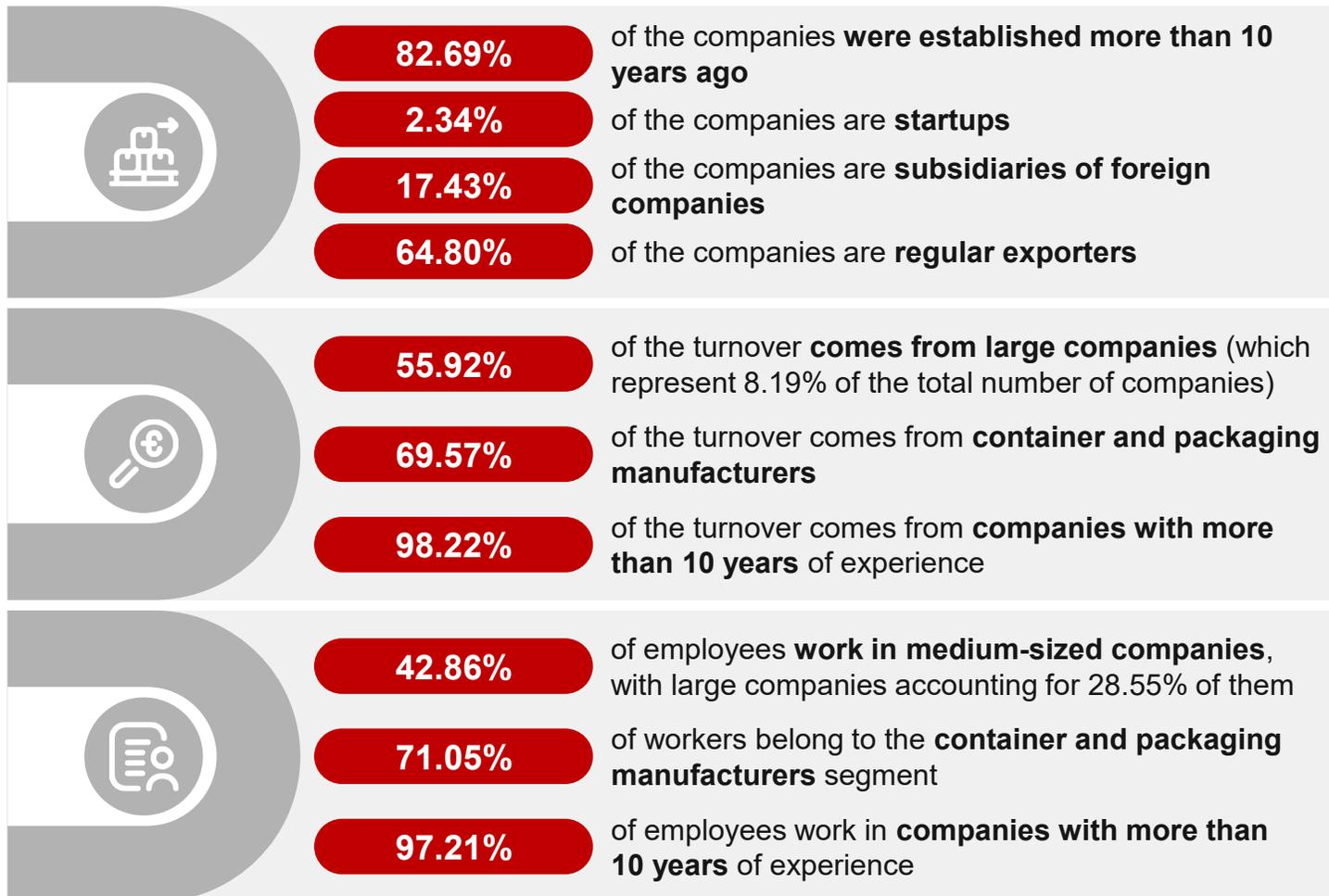
Key figures for the packaging sector in Catalonia (II)

Activity	Companies	%	Turnover from packaging (€)	%	Workers in packaging	%	Average CAGR (5 years, 2019-2024)	BDI average (Profit After Tax)
Containers and packaging	605	70.76%	€8.507 billion	69.57%	25,940	71.05%	4.48%	5.27%
Machinery	97	11.35%	€1.529 billion	12.50%	5,253	14.39%	5.71%	3.22%
Auxiliary machinery, peripherals and end-of-line	35	4.09%	€613.71 million	5.02%	2,074	5.68%	7.73%	4.24%
Packaging machinery	38	4.44%	€698.44 million	5.71%	2,346	6.43%	5.16%	4.07%
Packaging manufacturing machinery	24	2.81%	€216.49 million	1.77%	833	2.28%	2.93%	0.25%
Services	84	9.82%	€419.68 million	3.43%	2,525	6.92%	3.52%	3.04%
Packaging design services	56	6.55%	€203.37 million	1.66%	1,413	3.87%	3.15%	1.56%
Third-party packaging services	28	3.27%	€216.31 million	1.77%	1,113	3.05%	4.28%	5.83%
Suppliers	69	8.07%	€1.773 billion	14.49%	2,793	7.65%	2.96%	1.99%
Raw material	27	3.16%	€440.67 million	3.60%	932	2.55%	2.46%	3.61%
Other suppliers of packaging manufacturers (resins, adhesives, inks)	36	4.21%	€1.307 billion	10.69%	1,689	4.63%	2.86%	0.49%
Tooling (moulds, dies, etc.)	6	0.70%	€24.01 million	0.20%	172	0.47%	5.27%	3.43%
Grand total	855	100.00%	€12.227 billion	100.00%	36,512	100.00%	4.42%	4.54%

Notes: Classification developed based on the main line of business of the companies. Companies with headquarters outside Catalonia, but with a production plant in Catalonia, have been taken into account. The estimated turnover in packaging was done from interviews, phone calls or secondary sources, such as the company's website

Source: ACCIÓ, based on SABI (2025)

Company profile from the packaging sector in Catalonia



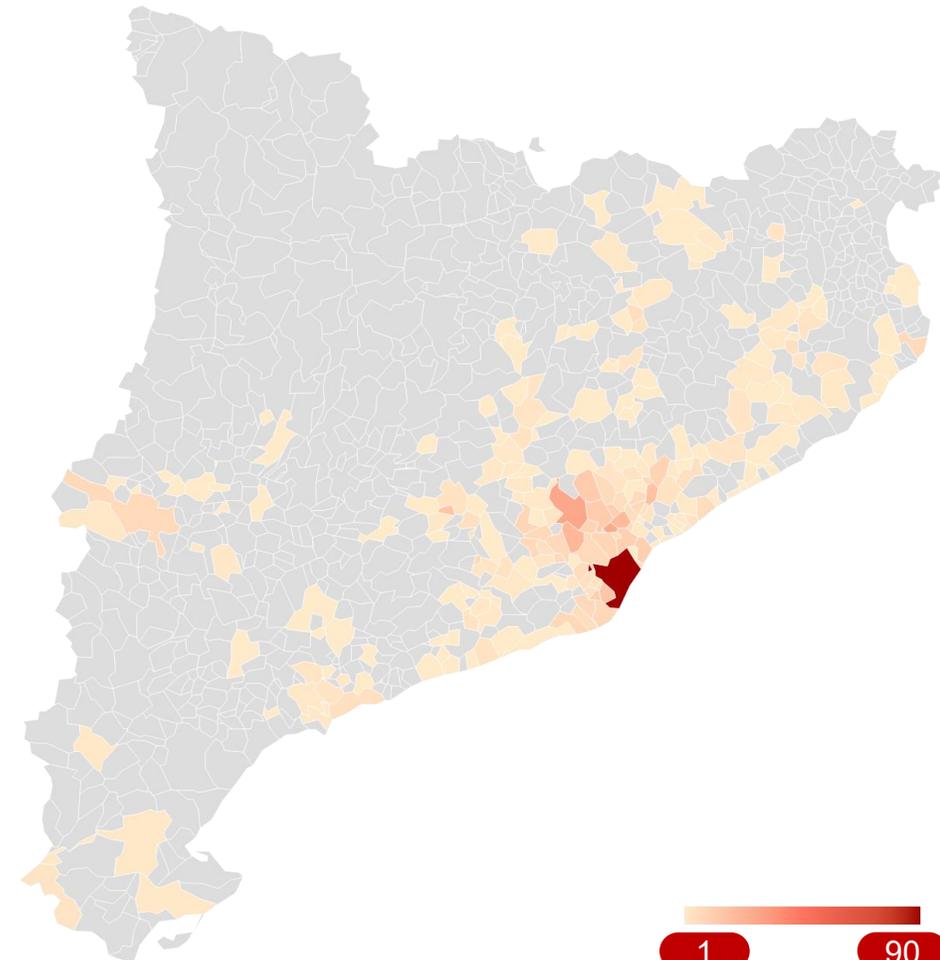
Source: ACCIÓ

The province of Barcelona concentrates more than 80% of the companies in packaging

Territorial distribution of companies in the sector

More than 80% of companies in packaging are in the province of Barcelona, 90 of which are in the Catalan capital.

#	Municipality	No. of companies
1	Barcelona	90
2	Terrassa	28
3	Barberà del Vallès	27
4	Rubí	21
5	Santa Perpètua de Mogoda	20
6	Granollers	17
7	Igualada	16
8	L'Hospitalet de Llobregat	15
9	Sabadell	13
10	Castellar del Vallès	13
11	Cornellà de Llobregat	12
12	Polinyà	12
13	Badalona	11
14	Montcada i Reixac	11
15	Sant Quirze del Vallès	10
16	Les Franqueses del Vallès	10
	Other	529
	Total	855



Source: ACCIÓ

Suppliers of packaging manufacturers

- Suppliers of packaging manufacturers represented **almost a fifth of the turnover**, despite accounting for less than 10% of companies.
- The category includes **world leading companies** in the manufacture of raw materials that have production plants and development centres in Catalonia, as well as **specialist companies** which provide key categories such as adhesives and inks or tooling companies for manufacturing packaging.



Raw material



Tooling



Other suppliers of packaging manufacturers



Note: Partial representation with the purpose of illustrating the companies from the different segments that make up the packaging sector in Catalonia
Source: ACCIÓ

Characterisation of the value chain of the packaging sector in Catalonia (II)

Container and packaging manufacturers

- Container and packaging manufacturers make up **more than 70% of the sector in Catalonia**, and predominate in the categories of plastic packaging (especially flexible) and paper and cardboard.
- Made up of both **companies part of large global groups** and **medium-sized companies with high growth**, which offer specialised solutions in materials and end markets and where a **high specialisation in food** stands out.

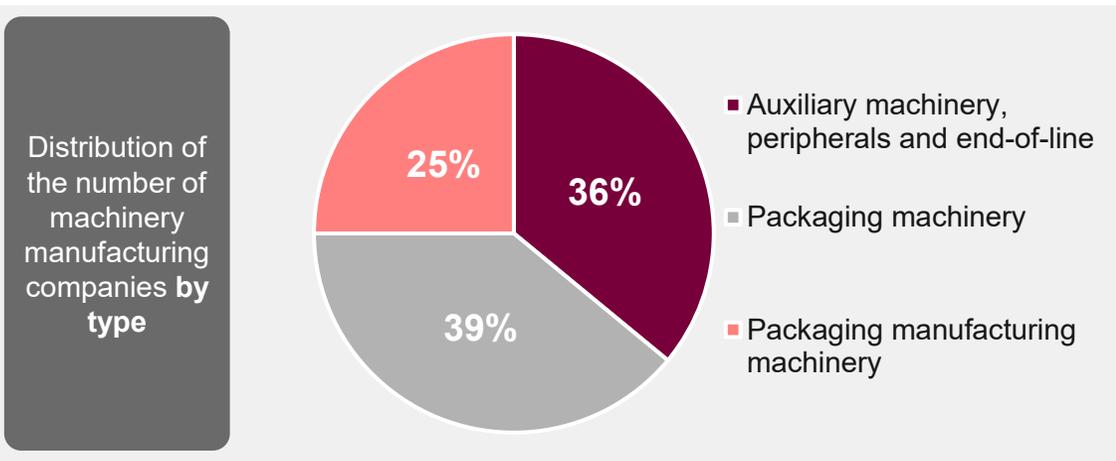
Distribution of container and packaging manufacturers companies by type of material	Material		
		% Companies (vs. total packaging manufacturers)	% Turnover (vs. total packaging manufacturers)
	Plastic	36.03%	39.75%
	Paper and cardboard	27.77%	31.84%
	Multi-material	23.47%	12.60%
	Metal	1.82%	7.36%
	Glass	1.82%	4.08%
	Wood	7.77%	2.54%
	Other	1.32%	1.82%



Note: Partial representation with the purpose of illustrating the companies from the different segments that make up the packaging sector in Catalonia
 Source: ACCIÓ

Machinery manufacturers

- Most of the **machinery companies** in Catalan packaging are **growing at rates greater than 5%**, above the sector average.
- Much of the segment **has a large international presence**, with companies with more than **80% of exports** and a high capacity for innovation in machinery and in the use of technology for automation processes, data collection or maintenance, among others.



Packaging manufacturing machinery

Packaging machinery

Auxiliary machinery, peripherals and end-of-line

Engineering companies

Note: Partial representation with the purpose of illustrating the companies from the different segments that make up the packaging sector in Catalonia
 Source: ACCIÓ

The packaging sector in Catalonia

3.2. A dynamic ecosystem that drives and transforms the sector

Catalan ecosystem of the packaging sector

Technological and research centres related to application technologies in the sector



Business clusters and associations



Training



Note: Partial representation with the purpose of illustrating the ecosystem of the packaging sector from Catalonia
Source: ACCIÓ

The Packaging Cluster, the entity that promotes the sector in Catalonia (I)

The Packaging Cluster is a leading entity in innovation, competitiveness and business development in the packaging sector, with **more than 160 member companies and entities** and one **specialist technical team**.

- Created in 2012 and based in Catalonia, the cluster enjoys strong territorial representation, with **partner companies spread throughout the territory**.
- The Packaging Cluster **represents the entire packaging value chain**, including material manufacturers (plastic, paper, cardboard, glass), transformers, machinery manufacturers, industrial service companies, technology centres and universities.
- In a context marked by regulatory pressure, sustainability and the transformation of the production model, the cluster has had a **key role in supporting companies in transition processes** towards the circular economy, digitalisation and technological differentiation, which has strengthened the competitiveness of the sector in international markets.

**PACKAGING
X CLUSTER**

Annual Meeting 2025



Source: Cluster website and interview

The Packaging Cluster, the entity that promotes the sector in Catalonia (II)

The cluster members with headquarters or relevant economic activity in Catalonia represent **12.6% of the total companies identified in the mapping**, but these contribute nearly **20% of the sector's turnover and number of workers**.



- The cluster is a good representative image of the packaging sector: **container and packaging manufacturers** represent 72% of the companies and +61% of the total turnover of the cluster, **machinery manufacturers** represent +9% of companies and +11% of turnover and **suppliers of packaging manufacturers** represent +10% of companies and +25% of turnover.
- All companies have a **CAGR of 4.1%** and an **average return of 4.37%**.
- The cluster's partner companies:
 - ▶ Have better profitability (average operating results 30.4% higher than the sector as a whole).
 - ▶ Grow more (average CAGR 63.4% higher than the sector as a whole).

Source: Cluster website and interview

Success stories: leading companies in packaging in Catalonia



Salaet: manufacturer of paper and cardboard packaging

Born in 1965 as **family business in the world of food packaging** and creator of its star product: the paper capsules for cupcakes. It **specialises in the manufacture of paper and cardboard packaging**.



Enplater Group: flexible and rigid packaging

Enplater Group has consolidated itself as a **supplier of advanced packaging solutions, currently with both flexible and rigid plastic**, for sectors such as food, mass consumption and pet food.



Font Packaging Group: corrugated and compact cardboard

Third-generation Catalan family business, founded in 1952. With a long history in the sector, Font Packaging Group **specialises in corrugated and compact cardboard packaging**, which is aimed at **industrial and consumer customers**.



Comexi: machinery manufacturer

Founded in Catalonia, Comexi is a **leading company in the design and manufacture of machinery for flexible packaging**, with a strong technological orientation and a clear international vocation.



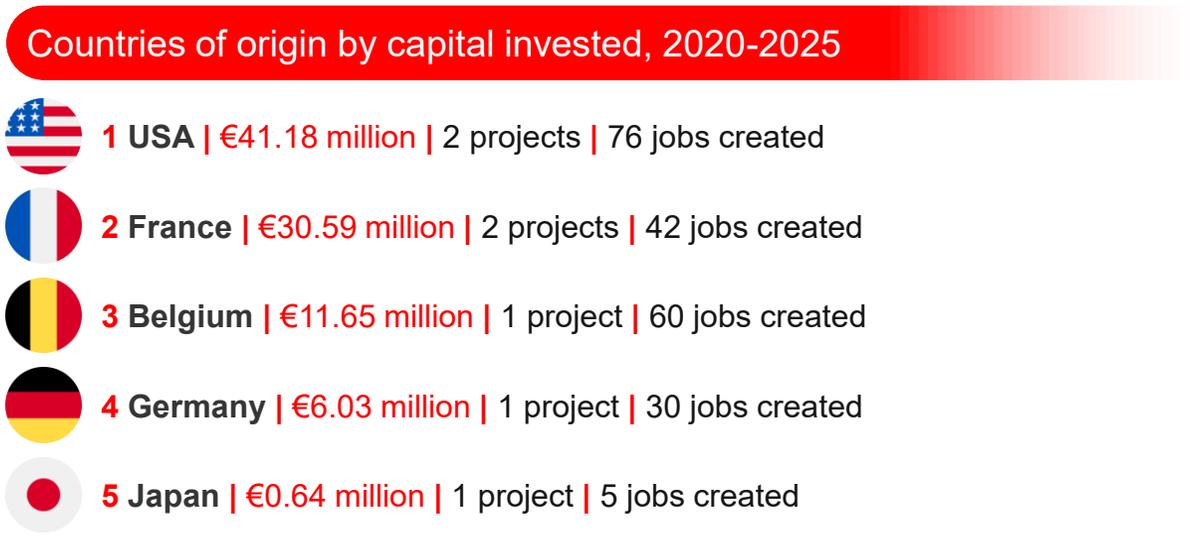
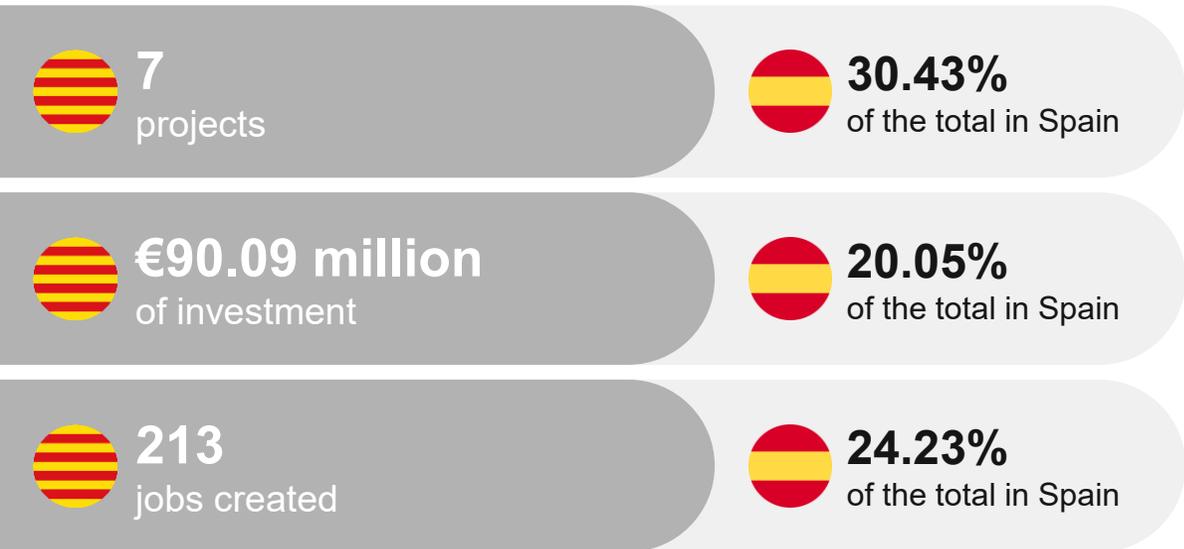
Source: Company websites, sector news and interviews

The packaging sector in Catalonia

3.3. International projection of Catalan packaging

Catalonia leads the way in attracting FDI projects in the packaging sector in Spain

Between 2020 and 2025, Catalonia has been the **region of Spain with the highest number of FDI projects** in the packaging sector and concentrates 30.43% of the national total. **More than half of the investment attracted (52.86%) was allocated to manufacturing projects**, although those linked to R&D represented a notable 45.71% of the capital attracted.



Main investment companies in Catalonia by invested capital, 2020-2025



Note: 2025 data includes the period from January to September
Source: ACCIÓ, based on fDi Markets, 2025

Catalonia is the 2nd region in the EU in number of FDI projects in the packaging sector



2nd region
in number of projects

5.30% of the EU total



6th region
in invested capital

3.90% of the EU total



7th region
in jobs created

3.43% of the EU total



Note: 2025 data includes the period from January to September

Source: ACCIÓ, based on fDi Markets, 2025

FDI in packaging in the EU (by projects), 2020-2025



1st North Rhine-Westphalia



3rd Flanders



5th Île-de-France



10th Community of Madrid



9th Auvergne-Rhône-Alpes



2nd Catalonia



4th Valencian Community



8th Tyrol



7th Bavaria

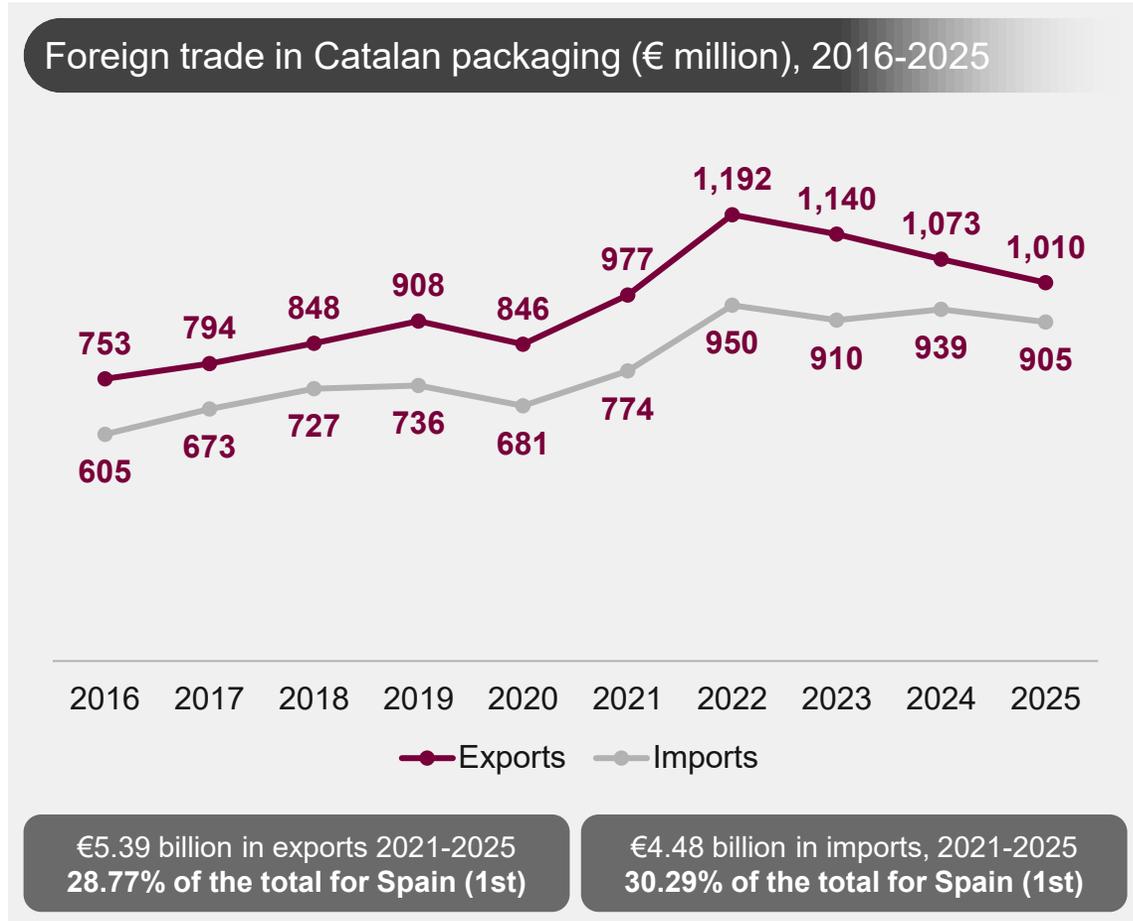


6th Silesia



Catalonia leads the exports of packaging in Spain, with 29% of the national total

- In the five-year period 2021-2025, **Catalonia** has been the **top exporting and importing region** for packaging in Spain.
- Catalan exports** in packaging **have grown by 29.96%** compared to the previous five-year period (2016-2020) and have gone from €4.15 billion to €5.39 billion.
- Plastic containers and packaging** represented **almost half of Catalan packaging exports** in the five-year period 2021-2025 (47.74% of the total exported).



Top 5 countries to which Catalonia exports, 2021-2025

Top 5 countries from which Catalonia imports, 2021-2025

- 1 France** | 34.71% of the total
- 2 Portugal** | 8.04% of the total
- 3 Italy** | 7.99% of the total
- 4 Germany** | 6.24% of the total
- 5 UK** | 4.94% of the total

- 1 France** | 21.33% of the total
- 2 Italy** | 16.90% of the total
- 3 Germany** | 16.15% of the total
- 4 China** | 8.84% of the total
- 5 Poland** | 5.53% of the total

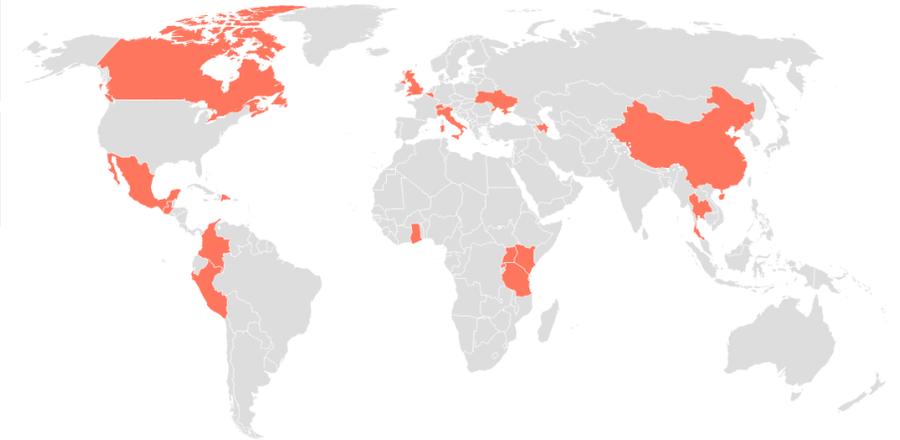
Note: The 2025 data includes the period from January to November. CNAE 1624, 1721, 2222 and 2592 have been considered
Source: ACCIÓ, based on ICEX-ESTACOM, 2026

20 countries offer international business opportunities related to packaging

6 opp.	6 opp.	5 opp.	3 opp.
The Americas	Europe	Africa	Asia
Canada	Belgium	Ghana	Azerbaijan
Colombia	Italy	Kenya	Thailand
Guatemala	Luxembourg	Rwanda	China
Mexico	United Kingdom	Tanzania	
Peru	Switzerland	Uganda	
Dominican Republic	Ukraine		

Countries with business opportunities for the Catalan packaging sector

20 countries



[Access the International Business Opportunity Recommender of ACCIÓ](#)

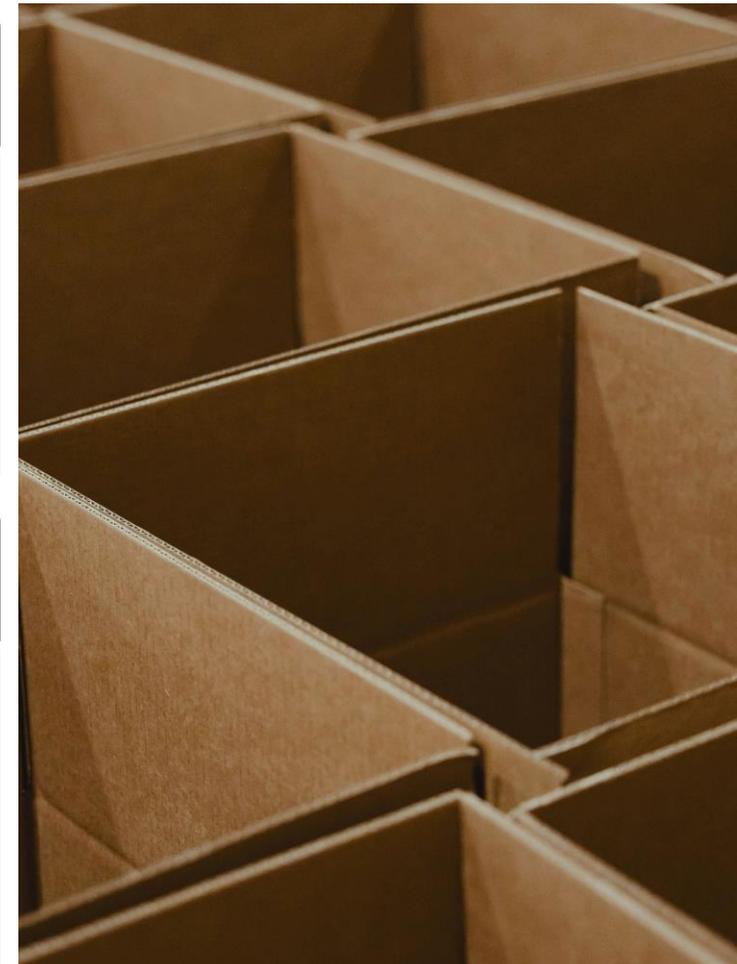
Source: ACCIÓ based on the "Global Map of International Business Opportunities 2025"

The packaging sector in Catalonia

4. Strategic trends and challenges for the Catalan packaging sector

Main trends impacting the packaging business

HIGH CONCENTRATION IN THE SECTOR	MARKET POLARISATION	SUSTAINABILITY AS A COMMODITY	COMPETITION FOR ACCESS TO RECYCLED MATERIALS
Large global mergers reinforce the power of large groups in predominant materials such as plastic or paper and cardboard.	The difference between large global players and local companies is increasing, each segment having different purchasing criteria.	Sustainability becomes a minimum requirement, especially due to European regulations.	Large packaging and customer groups are creating strategies to ensure the availability of quality recycled materials.
MORE COMPLEX DEMAND	COMPREHENSIVE USE OF AI AND DIGITAL TOOLS	COMPETITION FROM LOW-COST COUNTRIES IS GROWING	NEW BUSINESS MODELS
Constant innovations in formats and new products lead to an increase in short production runs and a greater need for planning and production flexibility.	Greater use of digital tools and AI solutions in terms of both design and improvement, planning, predictive maintenance and quality control.	Manufacturers from low-cost countries gain market share, especially in packaging machinery.	In a still incipient manner, new business models linked to servitisation models are being detected.



Source: ACCIÓ

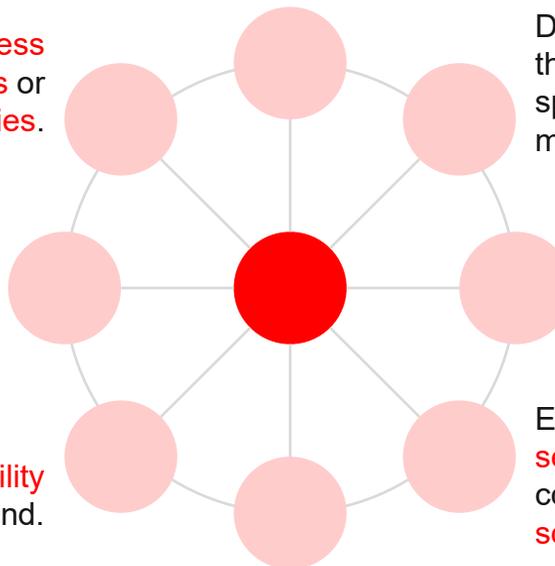
Strategic challenges for packaging manufacturers in Catalonia

Develop **sustainable packaging solutions that are competitive in functionality and cost**, incorporate own eco-design capabilities and knowledge of new materials, and make investments/partnerships to access higher quality recycled materials.

Increase critical mass based on the **incorporation of business groups/acquisition of companies, new markets/materials or alliances with complementary companies**.

Talent acquisition and retention to respond to current and future challenges.

Optimise **productive models via AI, automation and flexibility** to respond to more complex demand.



Deploy **market differentiation strategies**: ability to respond to the innovation needs of global players or to specialise in specific market segments and anticipate the needs of medium/large local customers.

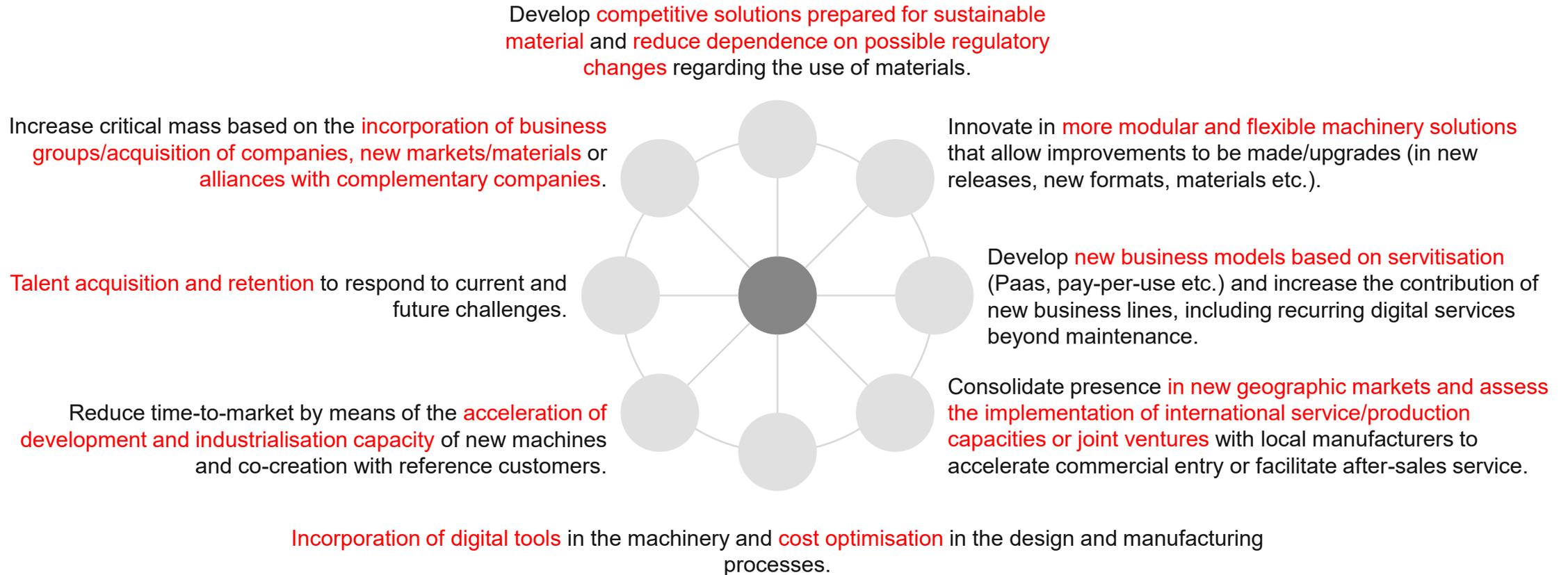
Develop **new business models based on servitisation** (Paas, pay-per-use etc.), as well as **new business opportunities from the PPWR regulation**, such as the management of reusable packaging for third parties.

Expand portfolio of **specialised solutions in growth market segments** (such as food-to-go, animal feed, specific e-commerce formats etc.) or incorporate **innovation in advanced solutions** (smart packaging, active packaging).

Open **new geographic markets in proximity** and assess international production deployment or alliances to offer geographical coverage to customers with a global presence.

Source: ACCIÓ

Strategic challenges for packaging machinery manufacturers in Catalonia



Source: ACCIÓ

Thank you!

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