Agricultural Films Market - Growth, Trends, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 126 pages | Mordor Intelligence

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Report description:

The agricultural films market is estimated to record a CAGR of 6.4% during the forecast period.

Key Highlights
The increasing protected agriculture practices, global focus on increasing agricultural output, adoption of mulching films, and increasing demand for biodegradable films are expected to drive the agricultural films market during the forecast period. The rising population across the world is an essential factor in raising the demand for food. This is increasing pressure on agricultural productivity. According to the FAO, in 2020, over 750 million metric tons of wheat were produced annually, with the lion's share of the wheat being used to produce food. Additionally, mulching films help conserve soil moisture, reduce weed growth, reduce soil erosion during rains, and increase soil temperature, killing insects and microorganisms and directly impacting productivity.
More specifically, with increased concerns about environmental risks, the demand for biodegradable agricultural films is expected to increase over the forecast period. Biodegradable agricultural plastics have the same properties as standard mulch plastics and also contribute to suppressing the weed, helping stabilize the room temperature, and preserving the nutrients and humidity of the soil, besides improving the stable development of the plant. However, environmental concerns over the usage of plastic films are expected to restrain the market's growth in the coming years.

Agricultural Films Market Trends

Increasing Demand for Films in Protected Agriculture driving the Market

The growing global population and increasing demand for year-round access to fresh produce boosted greenhouse-grown fresh produce, increasing the demand for agricultural films to enhance crop productivity. Polyethylene is a widely used material for agricultural films to protect crops and improve crop yield in greenhouses and tunnels. This increased demand for greenhouse fruits and vegetables in Canada is driving investments in greenhouses, boosting the demand for agricultural films in the country in

the coming years. For instance, according to StatCan, there were 892 greenhouse fruit and vegetable operations in Canada in 2021, up from 858 the previous year. Similarly, according to the Ministry of Agriculture, in 2020, greenhouses devoted to vegetable and flower production were the highest area observed in Spain, with more than 23 thousand hectares. With increasing greenhouse farming areas and protected farming practices, the agricultural film market is expected to grow during the forecast period.

Moreover, agriculture films reduce the crop spoilage risk associated with weather, pests, and weeds and help improve the overall crop quality, particularly in greenhouses, throughout their life cycle. Manufacturers are also using a wide range of additives, such as agrochemical resistance, UV absorber, and anti-fogging agent, to improve the lifespan and effectiveness of the agricultural films. The development of advanced agricultural films with technologies such as UV-blocking, nanotechnology, and ultra-thermic films has even increased the demand for agricultural films across the world. For instance, in November 2020, BASF announced its plastic additives portfolio expansion in Pontecchio Marconi, Italy. The new technology is expected to deliver a wide range of NOR solutions to help grow its agriculture industry.

Asia-Pacific Dominates the Agricultural Films Market

Large strips of the area under greenhouse vegetables and a growing emphasis on high-value and export-oriented cultivation of fruits and vegetables are driving the market for agricultural films in the Asia-Pacific region. The region occupies nearly half of the world's total area under greenhouse cultivation for vegetables. Furthermore, the shifting focus of consumers toward biodegradable films is expected to act as a major catalyst for the growth of the market due to rising awareness of environmental pollution. The bio-based plastics produced from renewable feedstocks have a minimum negative environmental impact. The biodegradable agricultural films are developed from various materials, such as corn starch, rice husk, pectin, and food waste. Product innovation, including ultraviolet (UV) blocking, NIR blocking, and fluorescent and ultra-thermic films, is expected to augment the market's growth over the forecast period. For instance, in April 2021, an agriculture film called Smart Glass ULR-80, which was designed by Australian scientists for use in commercial greenhouses, was launched. This was claimed to block much of the solar radiation that contributes to heat gain while transmitting most of the wavelengths required by plants for photosynthesis and growth. The impacts of two novel prototype technologies, energy-reducing 'Smart Glass' film ULR-80 (SG) and LLEAF-Red film, used in this film were claimed to shift green light to red for maximum vegetative growth.

Moreover, farmers in Asia-Pacific, particularly in China, are adopting protected agricultural practices to enhance crop productivity and quality. Almost 3.3 million hectares of crop area in China comes under protected cultivation. Other large countries in the region, such as India, Japan, and South Korea, also use agricultural films in greenhouses and mulching, especially in cultivating vegetables. Therefore, the expanding cultivation of fruits and vegetables through the greenhouse method in the Asia-Pacific region is expected to drive the market for agricultural films in the coming years.

Agricultural Films Market Competitor Analysis

The overall market for agricultural films is consolidated due to the presence of a few large players and several small-scale and regional players. Berry Global Inc., BASF SE, Ab Rani Plast Oy, Novamont, and Plastika Kritis SA are the major players in the market. Major industry participants have been investing heavily in R&D for commercializing biodegradable and longer shelf-life products. The key companies are partnering with biotechnology firms to ensure sustainable product innovation in the future.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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