

North America Stand-Up Pouch Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 125 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The North America Stand-Up Pouch Packaging Market size is estimated at USD 3.46 billion in 2024, and is expected to reach USD 4.10 billion by 2029, growing at a CAGR of 3.48% during the forecast period (2024-2029).

Stand-up pouch packaging products such as Standard, Aseptic, and Retort are considered under the scope of the market study. Stand-up pouch packaging offers an ideal protective barrier during shipment and transit and prevents any external element, such as moisture and dirt, from coming into contact with the item.

Key Highlights

- The growth of the frozen packaged industry across the region is expected to impact the market positively. Rising demand for packaged food and beverages, increasing demand for Ready-to-Eat (RTE) food, convenience of use, and cost-effectiveness of pouches are primary factors supporting the market growth.
- In addition, the rise in the need for on-the-go snacks has led to the demand for re-closable stand-up pouches as they offer convenience to customers. In addition, the changing lifestyle and food preferences among consumers and changing food technology further boost the market's demand.
- The growing consumer attention to environmental concerns, dynamic regulatory standards, the ongoing drive for sustainability, which comprises replacing plastic-based packaging products with biodegradable materials, and inadequate recycling rates due to the lack of cutting-edge recycling facilities are challenging the market's growth.
- The ongoing technological changes in packaging machinery to cope with the rapidly changing market requirements will pose a challenge as packaging manufacturers using traditional machinery are not well equipped to take the increasing workload of current market requirements. Players must either invest in new tools, spare parts, and software to meet the changing market needs or switch to new machinery.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

-The post-COVID-19 pandemic resulted in a surge in demand for packaging aided by the growing demand from the food and beverage and pharmaceutical industries, which will likely continue for the next few years.

North America Stand-Up Pouch Packaging Market Trends

Standard Pack Type Segment is Expected to Hold Significant Market Share

- Standard pouches, including baby food and liquid packaging (tea, coffee, and juices), are widely used in the food and beverage industry. Consumers' expectations for packaged fresh food to store all the natural properties and aromas drive the usage of standard pouches.
- The Standard Stand-up pouches are experiencing a surge in end-user industry demand, prompting manufacturers to strive for innovative solutions. The landscape is characterized by dynamic strategies, with companies adopting approaches such as collaboration, expansion, acquisition, and product launches to stay competitive.
- According to the USDA Foreign Agricultural Service, Coffee consumption in the United States amounted to over 26.3 million 60-kilogram bags in the 2022/2023 fiscal year. This is a slight increase from the total United States coffee consumption in the 2020/2021 fiscal year, which amounted to 25.94 million 60-kilogram bags.
- With increased coffee consumption, there is likely to be a higher demand for packaging solutions to contain and distribute the coffee. Standard Stand-up Pouches are a popular, versatile packaging option offering convenience, protection, and visibility. As coffee consumption rises, the demand for these pouches may also increase.
- The coffee market is highly competitive; brands often use packaging to differentiate themselves. Stand-up pouches provide ample space for branding, labeling, and marketing messages. As coffee consumption increases, companies will invest more in packaging that helps their products stand out on the shelves, which could boost the demand for stand-up pouches.

Canada Expected to Witness Significant Growth

- A key driving factor for the increased demand for stand-up pouches in Canada is the prevalent reliance on packaged and processed foods. University of Toronto's report indicated that approximately 75% of the nation's food supply comes from processed foods. The shift in consumption patterns underscores the need for convenient and sustainable packaging solutions, making stand-up pouches a preferred choice in the Canadian market.
- The food industry is expanding and changing swiftly, extending its packaging alternatives and looking for methods to be more productive. Additionally, more businesses, such as Logos Pack, Omniplast, Canada Brown, Rootree, and Grauman Packaging, are reconsidering their packaging decisions as more eco-friendly and sustainable packaging solutions become available.
- The pet food industry in Canada is booming, and as per Agriculture and Agri-Food Canada (AAFC) data, retail sales of pet food in Canada are expected to increase in CAGR by a further 4.9%, attaining CAD 5.3 billion (USD 0.22 billion) by 2025. In the pet food industry, stand-up pouches are a popular choice for packaging dry and wet pet food. Pouches with tear notches and easy-open features cater to the convenience of pet owners when serving their pets meals.
- The region is witnessing increased consumer demand for packaging options and rising adoption in the food, beverage, and pharmaceutical industries. Also, growing healthcare concerns and environmental regulations have increased the use of lightweight, high-barrier packaging products. The resealable benefit bolsters the growth of personal care and cosmetic applications.
- The existence of an expanding ex-pat population and the urge to try new products also drive the demand for ready meals. The region's need for quick and easy food, including prepared meals, is increasing due to shifting social and economic patterns. With rising health concerns, consumers are also focused on plant-based ready meals. According to Agriculture and Agri-Food Canada,

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

the retail sales of plant-based ready meals (free from meat) in Canada were 19.1 million USD in 2021, reaching 22.1 million USD in 2022.

- The market also witnessed corporate expansions, mergers, and acquisitions to expand corporate presence in the Canadian market due to increased demand across various end-users in the country.

North America Stand-Up Pouch Packaging Industry Overview

The North America stand-up pouch packaging market is fragmented, with the presence of major players like Amcor PLC, Mondi Group, Sealed Air Corporation, Sonoco Products Company, and Smurfit Kappa Group. Players in the market are adopting strategies such as partnerships and acquisitions to enhance their product offerings and gain sustainable competitive advantage.

- July 2023 - Huhtamaki OYJ announced a significant investment in its Paris, Texas, facility in the United States. The investment consists of an expansion of its manufacturing capacity as well as a consolidation of an external warehouse. The investment into production assets is approximately USD 30 million, and the warehouse and manufacturing facility will be leased. This brings significant opportunities to increase the North America business segment's capacity to support the growth of the food service business.

- January 2023- Glenroy Inc. announced that after a two-year development process, they received Critical Guidance Recognition from the Association of Plastic Recyclers (APR) for the recyclable STANDCAP. As a complete eco-friendly alternative to rigid plastic and glass bottles, the 100% Polyethylene recyclable STANDCAP is a major win for the environment, consumers, brands, retailers, and food safety. By emphasizing the company's sustainable, flexible packaging options, Glenroy contributes to ecological goals while also capitalizing on the growing market preference for sustainable solutions, driving business growth in the long term.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET INSIGHTS

4.1 Market Overview

4.2 Industry Attractiveness - Porter's Five Forces Analysis

4.2.1 Bargaining Power of Suppliers

4.2.2 Bargaining Power of Buyers/Consumers

4.2.3 Threat of New Entrants

4.2.4 Threat of Substitutes

4.2.5 Intensity of Competitive Rivalry

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 4.3 Industry Ecosystem Analysis
- 4.4 Industry Standards and Regulations
- 4.5 Recent Innovations in the Stand-Up Pouch Market
- 4.6 Comparative Analysis: Flat Packaging vs Stand-Up Pouch Packaging

5 MARKET DYNAMICS

5.1 Market Drivers

- 5.1.1 Demand for Food and Beverage Expected to Grow in North America, thereby Contributing to the Market Growth
- 5.1.2 Standard Pouches Offer a High Level of Convenience (Available in Zipper, Slider, Spout Packs, Etc.) and Require Less Material Volumes as Compared to Alternative

5.2 Market Challenges

- 5.2.1 Filling Machinery Changes for Producing Stand-Up Pouches Make Transitions Difficult to Implement

6 MARKET SEGMENTATION

6.1 By Pack Type

- 6.1.1 Standard
- 6.1.2 Aseptic
- 6.1.3 Retort
- 6.1.4 Other Pack Types

6.2 By Material Type

- 6.2.1 Plastic (PE, PP, PVC, EVOH, Bio-Plastics)
- 6.2.2 Metal/Foil
- 6.2.3 Paper

6.3 By End User

- 6.3.1 Food
- 6.3.2 Beverages
- 6.3.3 Medical and Pharmaceutical
- 6.3.4 Pet Food
- 6.3.5 Home and Personal Care
- 6.3.6 Other End Users

6.4 By Country

- 6.4.1 United States
- 6.4.2 Canada

7 COMPETITIVE LANDSCAPE

7.1 Company Profiles

- 7.1.1 Amcor PLC
- 7.1.2 Mondi Group
- 7.1.3 Sealed Air Corporation
- 7.1.4 Sonoco Products Company
- 7.1.5 Smurfit Kappa Group
- 7.1.6 ProAmpac LLC
- 7.1.7 Clondalkin Group
- 7.1.8 Huhtamaki Oyj
- 7.1.9 Dazpak Flexible Packaging
- 7.1.10 Glenroy Inc.
- 7.1.11 PPC Flexible Packaging LLC

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

North America Stand-Up Pouch Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 125 pages | Mordor Intelligence

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-03-01
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com