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North America Agricultural Chemical Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 120 pages | Mordor Intelligence

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Report description:

The North America Agricultural Chemical Packaging Market size is estimated at USD 1.02 billion in 2025, and is expected to reach USD 1.21 billion by 2030, at a CAGR of 3.4% during the forecast period (2025-2030).

Key Highlights
- Agrochemical packaging is one of the crucial parts of the agriculture industry as agrochemical products, such as fertilizers and pesticides, are toxic. They require advanced packaging solutions, helping reduce the risk of storing, handling, and transporting such chemical products. Packaging solutions used here are designed for better sealing.
- Among the materials, plastic is the most widely used packaging material for agrochemical products. The demand for bags, bottles, pouches, and containers is increasing, and vendors in the market are offering innovative and high-safety packaging solutions. For example, Scholle IPN offers a bag-in-a-box pouch packaging solution for packaging agricultural chemical products in the market.
- With the advancements in biodegradable packaging solutions fueling the demand for such packaging solutions, various vendors in the market are focusing on adopting such solutions as part of their offering, focusing on recycled resins. For example, in January 2021, Mauser Packaging Solutions introduced the KORTRAX Barrier Tight-Head container for transporting hazardous solvent-based products that are traditionally difficult to contain. KORTRAX containers are 100% recyclable post-use and are available in 20-liter, 5-gallon, and 10-liter sizes.
- According to Federal laws and regulations, there are many regulations with which a product's label or markings must comply before being sold in the United States. Labeling requirements related to legal metrology must abide by The Fair Packaging and Labeling Act (FPLA) and Uniform Packaging and Labeling Regulation (UPLR). In addition, all products imported into the US must conform to Title 19, United States Code, Chapter 4, Section 1304 and 19 CFR 134, Country of Origin Marking regulations.
- The packaging regulations limit vendor profits and divide them into smaller packages as weight and quantity regulations are to

be followed. Packaging solution providers also invest in compliance consultants and even outsource these compliance handling processes to entities that take care of these processes, thus impacting their profits in the market.
- The COVID-19 outbreak has affected international trade and global supply chains of essential and non-essential goods and services. With the spread of COVID-19 across the world, businesses have suffered significantly. The market was initially impacted due to the pandemic. Many countries in the region postponed the ban on single-use plastic. The pandemic led to the increase in the usage of plastic packaging for chemicals due to significant growth in e-commerce.

North America Agricultural Chemical Packaging Market Trends

Fertilizers to Hold Major Market Share

- In terms of agrochemicals, such as fertilizers, pesticides, herbicides, and other chemicals, the North American market has reached significant maturity, with the demand maintaining a steady point over the last few years. It is expected to remain the same over the coming years as well.
- North America is one of the most mature markets for fertilizer; it witnessed a slower growth rate in the last few years. According to the IFA, a prominent share of Nitrogen fertilizer application in the United States was held by Ammonia, Urea, and UAN, with a combined percentage share of over 60%.
- Among the crops, Maize and Wheat crops held nearly half of the country's Nitrogen fertilizer demand. Hence, vendors offering Nitrogen fertilizers in the region command a major share of the fertilizer market and drive the demand for packaging solutions.
- In the United States, most ammonia production occurs near large natural gas reserves in Louisiana, Oklahoma, and Texas due to the use of natural gas as a hydrogen feedstock and to fuel the high temperature and pressure needed to produce ammonia. A major share of the ammonia is produced by international companies and used for domestic consumption, with some imports from Trinidad and Tobago and Canada. A very small amount of ammonia produced in the region is exported.
- The region's largest ammonia producers are Nutrien, CF Industries, Moasaic, and Yara. Nitrogen fertilizer production facilities operate daily but have limited storage capacity, so fertilizers must be transported to warehouses and terminals for storage. Modes of transportation used to transport ammonia include refrigerated barge, rail car, pipeline, and tank truck.
- With the region's major share of the global fertilizer sector, the manufacturers' demand for packaging in the United States and Canada is significant. In addition, the region's vendors are witnessing easy and sustainable packaging solutions for fertilizers. For instance, in April 2021, Johnny Appleseed Organic came out with ClimateGard, a no-kill fertilizer for gardens that comes in sustainable cotton bags.

Plastic to Hold the Largest Market Share

- The countries in the North American region, such as the United States and Canada, are prominent manufacturers of plastic resins worldwide. According to the American Chemistry Council's Plastics Industry Producers Statistics (PIPS) Group, North American resin output increased by 0.7% to 124 billion pounds, up from 123.1 billion pounds in 2020. Polyethylene (PE) accounted for the largest share of production in 2020, followed by polypropylene (PP), polyvinyl chloride (PVC), and polystyrene (PS), according to the American Chemistry Council.
- Polyethylene (PE) is one of the most preferred materials because it has universal application. It is thermoplastic, and therefore an ideal sealing medium, and forms an excellent moisture barrier. The predominant requirement is the preservation of agrochemical formulations, particularly in humid climates.
- Blow-molded containers of high-density polyethylene (HDPE) offer broad flexibility in design and construction, good moisture barrier properties, and poor resistance to hydrocarbon solvents. Also, Biaxially oriented polyester is widely used for packaging

solvent and aqueous-based liquid products.
- More than 60 major brands, nonprofits, and government agencies are coming together to create a circular economy for plastics in the United States. Such acts are poised to reduce the usage of single-use plastics for agrochemical products in the region.
- Further, major cities are taking corrective measures to reduce the application of plastic packaging solutions for agricultural chemicals. For instance, in August 2021, Montreal made plans to ban many single-use plastics by March 2023.

North America Agricultural Chemical Packaging Industry Overview

The North American agricultural chemical packaging market is fragmented, with a considerable number of regional and global players. Owing to their market penetration and the ability to offer advanced products, intense competitive rivalry is expected. Moreover, the involvement of large-scale investment also increases the barriers to exit for existing players, thereby pushing the industry toward improved competition.

- February 2022 - ProAmpac, one of the leaders in flexible packaging and material science, announced that it has acquired Belle-Pak Packaging, an award-winning manufacturer of flexible packaging products. With the addition of Belle-Pak, ProAmpac expands its growing presence in Canada and extends its reach in high-growth e-commerce, healthcare and logistics end markets.
- September 2021 - Greif Inc. joined an alliance with a non-profit organization consisting of over 50 companies to end plastic waste in the environment and protect the planet. The alliance consists of member companies and supporters representing companies and organizations from across the plastic value chain and they partner with government, environmental and non-governmental organizations around the world to address the challenge of ending plastic waste in the environment.

Additional Benefits:

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

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