

## **North America Aerosol Cans - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-01-16 | 110 pages | Mordor Intelligence

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### **Report description:**

North America Aerosol Cans Market Analysis

North America aerosol cans market size in 2026 is estimated at 4.6 billion units, growing from 2025 value of 4.46 billion units with 2031 projections showing 5.34 billion units, growing at 3.05% CAGR over 2026-2031. Robust demand from personal-care, household cleaning and automotive maintenance categories sustains unit growth even as manufacturers pivot to lower-GWP propellants and recyclable substrates. Brand owners continue to favor aluminum for its barrier performance and closed-loop recyclability, while contract fillers localize production to mitigate logistics risks. Regulatory pressure under the AIM Act accelerates compressed-gas innovation that protects ozone and meets greenhouse-gas quotas, placing technology-ready suppliers at a competitive advantage. Supply chain realignment across the United States, Canada and Mexico further supports near-term capacity additions and long-term strategic partnerships that keep the North America aerosol cans market on a steady growth path.

North America Aerosol Cans Market Trends and Insights

Rising Demand from Personal-Care and Cosmetics

Premium deodorants, styling foams and refillable skincare aerosols propel the North America aerosol cans market as beauty brands chase consumer willingness to pay for sustainable metal packaging. Aluminum's barrier protection preserves sensitive ingredients, supports intricate decoration and taps circular-economy messaging that differentiates high-margin beauty lines.

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Partnerships such as Ball Corporation and Meadow's MEADOW KAPSUL refill system extend the product lifecycle and reduce waste, aligning with retailer carbon pledges. Mexican millennials with rising disposable incomes add volume in the regional beauty channel, prompting global manufacturers to site filling plants closer to demand clusters. Collectively, these factors add the largest positive swing to forecast growth.

#### Growth in Aerosolised Automotive Lubricants

Precision sprays for brake cleaners, penetrating oils and electrical contact agents underpin steady lubricant demand inside the North America aerosol cans market. Technicians appreciate metered delivery that minimizes overspray, while do-it-yourself hobbyists embrace convenience packaging sold through major hardware chains. Electric-vehicle adoption reshapes lubricant mix but keeps niche requirements for chassis, bearings and hybrid components that benefit from easy-to-apply aerosols. Rising maintenance of an aging light-vehicle parc in Canada compounds growth, whereas U.S. OEM hubs in Michigan and Ohio stimulate bulk orders for under-body corrosion inhibitors. New contract fillers with automotive certifications leverage these dynamics to capture share.

#### Competition from Substitute Packaging Formats

Trigger sprayers, bag-on-valve pouches and mechanically actuated pump bottles mimic aerosol performance without pressurised propellant, winning listings in household aisles. Aptar's PZ Advance pump, launched in 2025, delivers fine mist patterns suitable for air fresheners and hair care while advertising easier curb-side recycling. When brand owners favor simplified disposal and lower shipping class, aerosols cede facings, especially in fragrance-sensitive products. Yet aerosols preserve an edge in 360-degree dispensing and viscous-fluid handling, maintaining a technology tension that shapes product architecture decisions.

Other drivers and restraints analyzed in the detailed report include:

Acceleration of Household Surface-Care Sprays  
Preference for Infinitely Recyclable Aluminum Cans  
Aluminum and Steel Price Volatility

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

The aluminum segment accounted for 63.86% of the North America aerosol cans market share in 2025 as global beauty and household brands prioritized corrosion-free, high-gloss substrates. The segment's lead reflects a mature recycling infrastructure that turns post-consumer scrap back into can-sheet within weeks, delivering tangible carbon reductions that resonate with retailer scorecards and state procurement policies. While the North America aerosol cans market size for aluminum units is substantial, converters still face metal price swings that compel portfolio diversification.

Plastic aerosols grow at a 4.05% CAGR, supported by weight savings that lower freight costs, particularly for e-commerce distribution channels. Innovations such as SprayPET Revolution remove traditional metal valves, presenting a fully polymer construction compatible with bottle recycling streams. Although plastic lacks aluminum's gas barrier, barrier-coating technologies and multilayer laminates narrow the performance gap. Customer trials in surface-care refills and hairstyling foams illustrate the potential for plastic to capture incremental volume, but widespread adoption requires validated drop-test and pressure-retention data that meet DOT transport codes. Steel and tinplate remain relevant for food-grade and high-pressure industrial uses, yet their trajectory is flat amid lightweighting initiatives and trade-policy uncertainty.

One-piece monobloc designs represented 61.95% of unit shipments in 2025 due to streamlined extrusion processes and seamless

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graphics that attract premium personal-care brand owners. Production simplicity yields reliable cycle times and lower reject rates, which support high-volume SKUs in deodorants and hair sprays. Contract fillers leveraging universal tooling often default to monobloc lines to minimize changeover downtime, thereby cementing the format's dominance across the North America aerosol cans market.

Two-piece cans, however, expand at a 4.55% CAGR by optimizing metal usage and permitting thinner body walls without sacrificing burst strength. The architecture's drawn-and-ironed cups combined with separate domes make it easier to integrate lightweight neck finishes and precision valves. These features appeal to pharmaceutical and food aerosol manufacturers where internal lacquers and product purity are paramount. Three-piece welded cans serve niche industrial coatings where bespoke dimensions justify higher conversion costs. Across all formats, filling-line automation intensifies the focus on dimensional consistency, spurring converters to invest in in-line vision inspection and predictive-maintenance software that keep uptime high in a competitive market.

The North America Aerosol Cans Market Report is Segmented by Material Type (Aluminium, Steel, Tinsplate and More), Can Type (One-Piece, Two-Piece, Three-Piece), Propellant Type (Compressed Gas, Liquefied Gas, Bag-On-Valve), Capacity (?100ml, 101-300ml and More), End-User Industry (Personal Care and Cosmetics, Household Care and More) and Country. The Market Forecasts are Provided in Terms of Volume (Units).

List of Companies Covered in this Report:

Crown Holdings Inc. Ball Corporation Ardagh Group S.A. Trivium Packaging B.V. DS Containers Inc. CCL Container Inc. (CCL Industries Inc.) Mauser Packaging Solutions (BWAY Holding Company) Sonoco Products Company Graham Packaging Company L.P. ITW Sexton (Illinois Tool Works Inc.) AptarGroup Inc. Silgan Holdings Inc. Amcor Plc Montebello Packaging Inc. Exal Corporation Alltub Group Lindal Group Holding GmbH Toyo Seikan Group Holdings Ltd. Spray Products Corporation Nussbaum Matzingen AG

Additional Benefits:

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

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