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Modified Atmosphere Packaging Market Report by Material (Ethylene Vinyl Alcohol, Polyethylene, Oriented Polyethylene Terephthalate, Polyamide, and Others), Technology (Tray-Sealer Machine, Horizontal and Vertical Flow Packaging Machine, Deep-Drawing Machine, Vacuum Chamber Machine, Bag-Sealing Machine, and Others), Packaging Gases (Nitrogen, Oxygen, Carbon Dioxide, and Others), Application (Dairy Products, Poultry, Bakery and Confectionary, Seafood and Meat Products, Convenience Food, Fruits and Vegetables, and Others), and Region 2024-2032

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Abstracts

The global modified atmosphere packaging market size reached US$ 15.9 Billion in 2023. Looking forward, IMARC Group expects the market to reach US$ 24.6 Billion by 2032, exhibiting a growth rate (CAGR) of 4.8% during 2024-2032. The extended shelf life offered by the product, improved food safety, increasing consumer demand for freshly packaged foods, rising concerns for sustainability, rapid globalization of food supply chain, and advancements in food packaging technology are some of the major factors propelling the market.

Modified Atmosphere Packaging (MAP) is a food packaging technique that involves altering the composition of gases inside a sealed package to extend the shelf life of perishable products. This method is widely used in the food industry to preserve the

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freshness and quality of various food items, including fruits, vegetables, meats, and seafood. By adjusting the levels of oxygen, carbon dioxide, and nitrogen within the packaging, MAP slows down the deterioration processes that occur naturally, such as microbial growth and oxidation. As a result, products packaged using MAP can remain fresh for a longer period, reducing food waste and ensuring that consumers receive high-quality goods. This technology has proven to be an effective and reliable solution for food manufacturers and retailers seeking to enhance product safety, extend distribution distances, and ultimately provide consumers with a more convenient and sustainable food experience.

MAP significantly extends the shelf life of perishable food products by creating an optimal gas environment. This reduces food waste and allows for longer distribution periods, especially important in today's globalized supply chains. Additionally, MAP helps maintain the freshness and quality of food items while inhibiting the growth of pathogens and spoilage microorganisms. This contributes to improved food safety standards, reducing the risk of foodborne illnesses. Other than this, consumers are increasingly seeking fresh, minimally processed foods with longer shelf lives. MAP meets this demand by preserving the natural taste, color, and texture of products. Besides this, MAP reduces food waste, which aligns with the growing global emphasis on sustainability. It minimizes the environmental impact associated with food disposal and transportation. Besides this, as food distribution networks expand across borders, MAP enables products to withstand longer journeys while remaining fresh. This supports the global trade of perishable goods. In line with this, businesses benefit from reduced losses due to extended shelf life, making MAP a cost-effective solution in the long run.

Modified Atmosphere Packaging Market Trends/Drivers:
Extended Shelf Life

Modified atmosphere packaging extends the shelf life of perishable food products by controlling the levels of oxygen, carbon dioxide, and nitrogen within the packaging. This precise control inhibits the growth of spoilage microorganisms and slows down oxidative reactions. As a result, products like fresh produce, meats, and dairy items can stay fresh for a significantly longer time compared to traditional packaging methods.

Enhanced Food Safety

MAP contributes to enhanced food safety by creating an environment inside the package that inhibits the proliferation of harmful pathogens. By reducing the oxygen

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level and modifying the gas composition, MAP minimizes the risk of bacterial growth, thereby lowering the chances of foodborne illnesses. This technology ensures that consumers can trust the safety of the products they purchase, reinforcing the reputation of brands and fostering consumer confidence.

Increasing Consumer Demand for Freshness

In the food industry, consumers place a high premium on freshness. They seek products that retain their natural taste, color, and texture. MAP meets this demand by preserving the sensory qualities of food items. Whether it's crisp vegetables, succulent fruits, or tender meats, MAP ensures that these products maintain their appeal for an extended period. This aligns with consumer preferences for minimally processed and natural foods, ultimately driving purchasing decisions and brand loyalty.

Modified Atmosphere Packaging Industry Segmentation:
IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on material, technology, packaging gases and application.

Breakup by Material:

Ethylene Vinyl Alcohol
Polyethylene
Oriented Polyethylene Terephthalate
Polyamide
Others

Polyethylene (PE) dominates the market

The report has provided a detailed breakup and analysis of the market based on the material. This includes ethylene vinyl alcohol, polyethylene, oriented polyethylene terephthalate, polyamide, and others. According to the report, polyethylene (PE) represented the largest segment.

Its widespread use in packaging can be attributed to its versatility and cost-effectiveness. Polyethylene is available in various forms, including low-density polyethylene (LDPE) and high-density polyethylene (HDPE), allowing manufacturers to choose the most suitable type for specific packaging applications. Additionally, the

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excellent barrier properties of polyethylene make it highly effective in preserving the freshness of food products and protecting them from external contaminants. It is particularly adept at preventing moisture and oxygen from permeating the packaging, which is vital for extending the shelf life of perishable goods. Furthermore, polyethylene is known for its durability and strength, which ensures that packaged products remain intact during transportation and handling. Its flexibility also makes it an ideal choice for creating various packaging formats, from bags and pouches to bottles and containers.

Breakup by Technology:

Tray-Sealer Machine
Horizontal and Vertical Flow Packaging Machine
Deep-Drawing Machine
Vacuum Chamber Machine
Bag-Sealing Machine
Others

A detailed breakup and analysis of the market based on technology has also been provided in the report. This includes tray-sealer machine, horizontal and vertical flow packaging machine, deep-drawing machine, vacuum chamber machine, bag-sealing machine, and others.

Tray-sealer machines are designed for sealing products in trays or containers, offering excellent product protection and presentation. They are widely used for packaging fresh and processed foods, pharmaceuticals, and various consumer goods. The market for tray-sealer machines is driven by the demand for extended shelf life, tamper-evident packaging, and attractive product display. These machines provide airtight seals, preventing contamination and preserving product freshness. Additionally, the flexibility to accommodate different tray sizes and sealing options makes tray-sealer machines a preferred choice for manufacturers aiming to meet diverse packaging requirements.

Horizontal machines are ideal for wrapping products like bars, bakery items, and hardware, while vertical machines excel at packaging items like candies, grains, and liquids. The market for these machines has expanded due to their speed, flexibility, and ability to create airtight packages. Horizontal and vertical flow packaging machines enhance product visibility and ensure consistent, high-quality packaging. The demand is driven by industries such as food and beverages, pharmaceuticals, and cosmetics, where efficient and attractive packaging is essential for product differentiation and consumer appeal.

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Deep-drawing machines create customized trays or containers by forming plastic sheets into the desired shape and then sealing them. The market for deep-drawing machines is growing as manufacturers seek precise and secure packaging solutions to protect and present their products effectively. Deep-drawn packaging offers excellent product protection and extends shelf life, making it essential for industries focused on perishable goods. The ability to create tailored packaging solutions with deep-drawing machines addresses the diverse needs of manufacturers and enhances the overall efficiency of their packaging processes.

Breakup by Packaging Gases:

Nitrogen
Oxygen
Carbon Dioxide
Others

Carbon dioxide accounts for the majority of the overall market share

The report has provided a detailed breakup and analysis of the market based on the packaging gases. This includes nitrogen, oxygen, carbon dioxide, and others. According to the report, carbon dioxide represented the largest segment.

CO2 is a natural component of the atmosphere of the Earth, making it readily available and cost-effective. This accessibility ensures that CO2 is a practical choice for many packaging applications. Additionally, CO2 offers outstanding preservation properties. It functions as a natural preservative by displacing oxygen inside packaging, which helps inhibit the growth of aerobic microorganisms and prevents oxidative reactions in food products. This preservation capability significantly extends the shelf life of a wide range of perishable goods, including meat, seafood, and bakery items. Moreover, carbon dioxide is eco-friendly and poses no harm to the environment when properly handled and disposed of. This aligns with the global shift toward sustainable and environmentally responsible packaging practices.

Breakup by Application:

Dairy Products
Poultry
Bakery and Confectionary

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Seafood and Meat Products
Convenience Food
Fruits and Vegetables
Others

Fruits and vegetables represent the largest application area

The report has provided a detailed breakup and analysis of the market based on the application. This includes dairy products, poultry, bakery and confectionary, seafood and meat products, convenience food, fruits and vegetables, and others. According to the report, fruits and vegetables represented the largest segment.

Fruits and vegetables are staples in the human diet and are consumed globally. Their prominence in diets makes them a substantial segment within the food industry. Moreover, with the increasing awareness about the health benefits associated with a diet rich in fresh produce, there is a growing demand for these items. Additionally, the perishable nature of fruits and vegetables necessitates effective preservation and packaging methods. Modified Atmosphere Packaging (MAP), for instance, plays a critical role in extending the shelf life of these products, reducing food waste, and ensuring they reach consumers in optimal condition. Furthermore, the visual appeal and freshness of fruits and vegetables are crucial factors influencing consumer purchasing decisions. Proper packaging, such as clear films or trays, allows consumers to inspect the quality of the produce, which is essential in the competitive market. Moreover, the global trade of fruits and vegetables has surged in recent years, with products often traveling long distances. Effective packaging not only maintains product freshness but also reduces damage during transit, enhancing the viability of international trade.

Breakup by Region:

North America
United States
Canada
Asia-Pacific
China
Japan
India
South Korea
Australia
Indonesia

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Others
Europe
Germany
France
United Kingdom
Italy
Spain
Russia
Others
Latin America
Brazil
Mexico
Others
Middle East and Africa

Asia Pacific leads the market, accounting for the largest modified atmosphere packaging market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific accounted for the largest market share.

The region possesses a massive and diverse food industry with a high demand for MAP technology. The growing middle-class population and urbanization have led to increased consumption of packaged, convenience, and ready-to-eat foods, all of which benefit significantly from MAP in terms of shelf-life extension and preservation of freshness. Additionally, Asia Pacific countries are major producers and exporters of fresh produce, seafood, and processed foods. MAP enables these nations to expand their export capabilities by extending the shelf life of perishable goods, maintaining product quality during transportation, and complying with stringent international food safety standards. Furthermore, the region's focus on sustainability and reducing food waste aligns with the eco-friendly aspects of MAP technology. Reducing food loss is a priority, and MAP helps achieve this goal by minimizing spoilage and increasing product longevity.

Competitive Landscape:

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Research and development have been a focal point for these companies. They invest heavily in developing innovative MAP solutions that cater to a wide range of products and packaging needs. This includes the development of advanced gas-mixing technologies, more sustainable packaging materials, and improved sealing techniques to enhance the effectiveness of MAP. Additionally, these players actively engage in collaborations and partnerships with food manufacturers and retailers. By providing comprehensive MAP solutions and offering technical support, they create mutually beneficial relationships that encourage the adoption of MAP technology among their clients. Other than this, key players prioritize educating the market about the benefits of MAP. They conduct awareness campaigns, seminars, and workshops to highlight how MAP can reduce food waste, extend shelf life, and improve food safety. These efforts not only enhance the understanding of MAP but also foster trust in the technology. Besides this, sustainability is a growing concern, and key players are taking steps to develop eco-friendly MAP solutions. This includes using recyclable materials for packaging and exploring alternative, more environmentally friendly gases for modified atmospheres.

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Air Products & Chemicals Inc.
Amcor plc
Barry-Wehmiller Companies
Berry Global Inc
Ilapak International S.A.
Linde plc
Multisorb Technologies Inc. (Filtration Group Corporation)
Orics Industries Inc.
Robert Reiser & Co. Inc.
Sealed Air Corporation
The Middleby Corporation
(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

Recent Developments:
Amcor Plc has recently made an important announcement regarding their commitment to environmental sustainability. They have introduced the 'Reducing CO2 Packaging' Label, certified by the reputable Carbon Trust organization, to be featured on Amcor

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packaging. This label signifies a noteworthy reduction in the carbon footprint associated with their packaging materials and processes. This initiative is an integral part of Amcor's comprehensive lifecycle assessment service, which offers brands a valuable tool to assess and quantify the environmental impact of their packaging solutions. Through this service, brands can gain insights into their packaging's carbon footprint, starting from the extraction of raw materials to the product's end-of-use phase.
Berry Global Inc. has undertaken a significant investment exceeding USD 70 million in its wipe substrate capabilities located in the United States. This substantial financial commitment represents a substantial step forward for the company and marks a pivotal moment in its growth and expansion strategy. As part of this substantial investment, Berry Global has introduced a new production line. This new line enhances their overall manufacturing capacity and also brings advanced technology into their production processes.
Air Products has introduced an innovative and aromatic solution in the United Kingdom by launching a novel scented modified atmosphere packaging. This development represents a significant advancement in the packaging industry, offering a unique sensory experience to consumers. The key feature of this scented modified atmosphere packaging lies in its use of modified atmosphere packaging gas. This gas plays a crucial role in enhancing the product by vaporizing natural scents, including essential oils, directly into the packaging.

Key Questions Answered in This Report

1. What was the size of the global modified atmosphere packaging market in 2023?
2. What is the expected growth rate of the global modified atmosphere packaging market during 2024-2032?
3. What are the key factors driving the global modified atmosphere packaging market?
4. What has been the impact of COVID-19 on the global modified atmosphere packaging market?
5. What is the breakup of the global modified atmosphere packaging market based on the material?
6. What is the breakup of the global modified atmosphere packaging market based on the packaging gases?
7. What is the breakup of the global modified atmosphere packaging market based on the application?
8. What are the key regions in the global modified atmosphere packaging market?
9. Who are the key players/companies in the global modified atmosphere packaging market?

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