

Agricultural Waste Packaging Market Forecasts to 2032 – Global Analysis By Material Type (Bioplastics, Paper & Paperboard, Cellulose-based Materials, Agricultural Residue Composites, Starch-based Polymers and Hemp & Jute Fibers), Packaging Type, Application, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Agricultural Waste Packaging Market is accounted for \$2.63 billion in 2025 and is expected to reach \$4.28 billion by 2032 growing at a CAGR of 7.2% during the forecast period. Agricultural waste packaging involves transforming farm residues like crop husks, stalks, and other organic by-products into eco-friendly packaging materials. This innovation addresses the global challenge of plastic waste by offering a biodegradable and compostable alternative to traditional petroleum-based packaging. Beyond reducing environmental damage, it creates new value for farmers by repurposing biomass that would otherwise go unused. Growing environmental awareness, stricter regulations on plastics and rising consumer preference for sustainable products are accelerating adoption. By closing resource loops and promoting waste-to-value practices, agricultural waste packaging plays a crucial role in advancing the circular economy while supporting both ecological balance and rural economies.

According to the Food and Agriculture Organization (FAO) of the United Nations, Globally, around 12.5 million tonnes of plastic products are used in plant and animal production each year, and a significant share of this becomes waste, including plastic packaging for agricultural inputs and products.

Market Dynamics:

Driver:

Rising environmental concerns

Environmental sustainability remains a critical driver shaping the agricultural waste packaging market. Traditional plastic packaging has been linked to serious ecological issues, including soil contamination, water pollution, and long-term landfill accumulation. As awareness of these problems grows, demand for biodegradable and renewable packaging solutions is accelerating. Agricultural waste packaging aligns perfectly with these goals since it transforms crop residues into eco-friendly materials that decompose naturally. With governments enforcing stricter bans on single-use plastics and consumers embracing sustainable lifestyles, agricultural waste packaging is positioned as a vital innovation for protecting natural ecosystems and promoting a greener future.

Restraint:

High production costs

A major barrier restricting the agricultural waste packaging market is its relatively high manufacturing cost. Converting crop residues like husks and stalks into durable packaging requires advanced technologies, costly machinery, and specialized treatment processes. These requirements raise overall production expenses, making agricultural waste-based packaging more expensive than conventional plastics. For small producers, the need for heavy investments in infrastructure and equipment creates additional challenges in scaling operations. This cost gap often discourages businesses operating in competitive markets where price is a deciding factor. Until technological progress and larger-scale production help reduce expenses, high costs remain a crucial obstacle to wider adoption.

Opportunity:

Increasing government support and regulations

Supportive government initiatives are unlocking major opportunities for agricultural waste packaging. With bans on single-use plastics spreading worldwide, industries are being compelled to explore biodegradable alternatives. Policies that provide financial incentives, including subsidies and tax breaks, make it easier for businesses to adopt agricultural waste-based solutions. Moreover, international commitments toward

sustainability and carbon reduction are encouraging industries to prioritize circular economy practices. This favorable regulatory environment not only boosts awareness but also drives investment in research and infrastructure. As governments intensify environmental legislation, agricultural waste packaging is positioned to become a mainstream packaging choice, accelerating growth across multiple industrial sectors.

Threat:

Competition from conventional packaging

The agricultural waste packaging market faces a significant threat from the dominance of conventional packaging, particularly plastics. Plastics are inexpensive, widely available, and supported by mature supply chains, giving them a strong competitive edge. Many businesses choose plastic over sustainable options because of its affordability and proven reliability in large-scale operations. In contrast, agricultural waste packaging is still evolving, with limited scalability and higher production costs. Without technological breakthroughs or strong policy support, it struggles to compete on equal terms. This entrenched reliance on plastic packaging continues to undermine the growth of eco-friendly alternatives and slows down their mass-market adoption.

Covid-19 Impact:

COVID-19 influenced the agricultural waste packaging market in both negative and positive ways. During the early phases, lockdowns and restrictions disrupted raw material supplies, reduced workforce availability, and hampered manufacturing activities. These challenges led to production delays and increased costs for producers. Despite these setbacks, the pandemic boosted demand for hygienic and sustainable packaging, especially in food delivery and online retail. Consumers became more conscious of environmental safety and sought alternatives to conventional plastics. As economies reopened, government policies promoting green practices supported recovery. Consequently, COVID-19 accelerated the shift toward sustainable solutions, positioning agricultural waste packaging as a promising long-term market trend.

The paper & paperboard segment is expected to be the largest during the forecast period

The paper & paperboard segment is expected to account for the largest market share during the forecast period. This leadership is driven by the material's sustainability, renewability, durability, recyclability, and affordability, which make it highly favored

across various packaging sectors. Research indicates that paper and paperboard represented about 53.7% of the global biodegradable packaging market in 2022. Furthermore, in the wider sustainable packaging industry, they dominated material consumption, contributing nearly 41% of total revenue in 2024. The presence of a well-established production and recycling infrastructure, along with strong consumer acceptance, continues to strengthen their market dominance.

The bags & pouches segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the bags & pouches segment is predicted to witness the highest growth rate. Their rapid growth is driven by increasing demand for flexible, lightweight, and eco-friendly packaging that serves diverse agricultural and food-related applications. These solutions are economical, space-saving, and enhance product shelf performance, making them a preferred choice across supply chains. The rising influence of online retail, packaged food consumption, and sustainability awareness further accelerates their adoption. Compared to alternatives like trays, sacks, bulk packaging, and rigid formats, which expand at more moderate rates, bags and pouches, clearly dominates in growth pace, ensuring their position as the leading high-growth rate packaging segment.

Region with largest share:

During the forecast period, the Europe region is expected to hold the largest market share. Europe's dominance is driven by robust environmental legislation, proactive policy frameworks, and strong public support for green practices. Initiatives such as the EU Circular Economy Action Plan and bans on single-use plastics have substantially fueled demand for sustainable packaging materials. Furthermore, the region benefits from sophisticated recycle systems, significant investments in sustainable material research, and wide-scale adoption by retailers and brands. These combined strengths make Europe the leading region for agricultural waste-based packaging on a global scale.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR. Factors driving this rapid rise include strong economic growth, increasing urban populations, and booming demand for packaged goods through retail and online platforms. Regional governments are playing a key role by banning single-use plastics

and incentivizing sustainable alternatives. At the same time, plentiful agricultural residues in countries like India and China provide affordable inputs for eco-friendly packaging production. Consumer preference for sustainable products is rising steadily, while industries are investing heavily in green technologies.

Key players in the market

Some of the key players in Agricultural Waste Packaging Market include Sonoco Products Company, Mondi Group, Greif Inc., 3R-BioPhosphate Ltd., Amcor PLC, Bemis Company, Inc., Packaging Corporation of America, LC Packaging International BV, Pakka Limited, Proampac LLC, Flex-Pack, SAFEPACK Industries Ltd., Epac Holdings LLC, Mpacks and BioD Inc.

Key Developments:

In July 2025, Greif, Inc. announced it has entered into a definitive agreement to divest its Containerboard business, including its CorrChoice sheet feeder network, in an all-cash transaction for \$1.8 billion to Packaging Corporation of America. The transaction is expected to close by the end of Greif's fiscal year 2025, and is subject to customary closing conditions, including regulatory approvals.

In December 2024, Sonoco Products Company announced it has entered into an agreement to sell its Thermoformed and Flexibles Packaging business ("TFP") to TOPPAN Holdings Inc. for approximately \$1.8 billion on a cash-free and debt-free basis and subject to customary adjustments. The Transaction, which reflects the completion of the previously announced strategic review of Sonoco's TFP business, is subject to customary closing conditions, including regulatory approvals, and is expected to close in the first half of 2025.

In March 2024, Mondi PLC and DS Smith PLC, two United Kingdom-based paperboard and packaging producers, have disclosed reaching an agreement in principle for Mondi to acquire DS Smith. The agreement covers key financial terms of a possible all-share offer by Mondi for DS Smith, pursuant to which Mondi would acquire the entire issued and to-be-issued share capital of DS Smith, according to the companies.

Material Types Covered:

Bioplastics

Paper & Paperboard

Cellulose-based Materials

Agricultural Residue Composites

Starch-based Polymers

Hemp & Jute Fibers

Packaging Types Covered:

Bags & Pouches

Trays & Containers

Wraps & Films

Bulk Packaging

Sacks & Liners

Rigid Packaging

Applications Covered:

Fertilizers

Pesticides

Seeds & Grains

Fresh Produce

Animal Feed

Compost & Soil Amendments

Agri Tools & Accessories

End Users Covered:

Farmers

Agrochemical Companies

Seed Producers

Food Distributors

Agri Retailers

Government & NGOs

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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