

Modified Atmosphere Packaging (MAP) for Fresh Produce Market Forecasts to 2034 - Global Analysis By Product Type (Fruits, Vegetables and Exotic Produce), Packaging Material, Technology, Packaging Format, Distribution Channel and By Geography

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Abstracts

According to Statistics MRC, the Global Modified Atmosphere Packaging (MAP) for Fresh Produce Market is accounted for \$20.7 billion in 2026 and is expected to reach \$40.6 billion by 2034 growing at a CAGR of 8.8% during the forecast period. Modified Atmosphere Packaging (MAP) for Fresh Produce uses controlled gas conditions within sealed packages to manage respiration and extend the quality of perishable fruits and vegetables. By balancing oxygen, carbon dioxide, and humidity, the method helps retain freshness, appearance, firmness, taste, and nutritional value throughout handling and distribution. It can limit dehydration, microbial spoilage, and rapid maturation, thereby extending usable shelf life. MAP is increasingly applied to fresh-cut vegetables, prepared salads, berries, leafy greens, and other products requiring effective preservation.

According to FAO, global food loss after harvest, including on-farm activities, transportation, storage, wholesale and processing, was 13.3% in 2023, compared with 13.0% in 2015. This highlights the continuing need for technologies that protect perishable food throughout supply chains.

Market Dynamics:

Driver:

Rising demand for extended freshness and shelf life

The increasing need to preserve fresh fruits and vegetables for longer periods is driving adoption of Modified Atmosphere Packaging (MAP). By regulating oxygen and carbon dioxide levels within packages, MAP reduces respiration rates, delays ripening, limits moisture loss, and protects overall product quality. These benefits are particularly important across transportation, warehousing, and retail operations. Longer distribution networks and growing consumer expectations for consistently fresh produce are encouraging producers, distributors, and retailers to use MAP technologies for maintaining freshness and reducing losses across perishable supply chains.

Restraint:

High packaging and equipment costs

The relatively high cost of MAP materials, machinery, and supporting equipment can limit market expansion. Effective MAP operations often require specialized packaging films, precise sealing technologies, gas-management systems, and dedicated machinery, increasing capital and operational expenditures. Smaller producers and processors may hesitate to adopt these solutions when investment returns are uncertain or product values are low. Consequently, financial constraints can discourage MAP implementation among businesses with restricted budgets, modest processing capacities, or limited production volumes, slowing broader adoption across fresh produce supply chains.

Opportunity:

Expansion of fresh-cut and ready-to-eat produce

Growing consumption of fresh-cut and ready-to-eat fruits and vegetables offers strong expansion potential for Modified Atmosphere Packaging (MAP). Processing activities such as cutting and peeling can increase exposure to oxygen and accelerate quality deterioration, moisture loss, respiration, and microbial growth. MAP can help maintain product freshness, visual appeal, texture, and usability for longer periods. Increasing demand for convenient salads, prepared vegetables, sliced fruits, and other ready-to-consume products can therefore encourage food companies to implement MAP technologies and expand distribution opportunities for processed fresh produce.

Threat:

Stringent food-safety and packaging regulations

Strict regulatory requirements represent a potential threat to the expansion of Modified

Atmosphere Packaging for Fresh Produce. MAP packaging must comply with food-contact standards, labeling rules, gas specifications, package integrity requirements, and appropriate storage conditions. Differences in regulations between markets can create additional compliance challenges for producers and exporters. New requirements concerning packaging materials or food safety may further demand testing, certification, and operational changes. These obligations can increase expenses, delay product launches, and create barriers for companies developing innovative MAP technologies for fresh produce.

Covid-19 Impact:

COVID-19 affected the Modified Atmosphere Packaging (MAP) for Fresh Produce Market by disrupting agricultural supply chains, logistics, workforce availability, and foodservice operations. Longer transportation delays and distribution challenges increased the importance of technologies capable of maintaining produce quality and extending shelf life. MAP attracted attention as controlled gas environments can slow deterioration and preserve freshness. Nevertheless, restrictions on industrial activity, material availability, and equipment manufacturing created temporary obstacles. These challenges delayed investments, installations, and broader implementation of MAP solutions among fresh produce producers and distributors.

The vegetables segment is expected to be the largest during the forecast period

The vegetables segment is expected to account for the largest market share during the forecast period, supported by their short shelf life and vulnerability to moisture loss, respiration, oxidation, and microbial spoilage. MAP provides controlled atmospheric conditions that help preserve vegetable freshness, appearance, texture, taste, and nutritional characteristics. It is widely applicable to leafy vegetables, prepared salad combinations, cut produce, and other perishable varieties. By extending quality retention during handling, storage, transportation, and retail display, MAP supports efficient distribution throughout vegetable supply chains.

The online retail & e-commerce segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the online retail & e-commerce segment is predicted to witness the highest growth rate, driven by the rapid expansion of online grocery purchasing and home delivery of perishable foods. Fresh produce sold through digital

channels requires packaging that protects quality during handling, transportation, and delivery. MAP can help maintain freshness, appearance, texture, and shelf life throughout the delivery process. Growing consumer preference for convenient online purchasing is encouraging retailers and suppliers to strengthen packaging solutions for fresh produce distribution.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, benefiting from sophisticated produce distribution networks, developed packaging capabilities, and consumer demand for convenient, fresh, and quality-assured foods. Food processors, retailers, and distributors increasingly use packaging technologies that help maintain produce quality throughout transportation, storage, and merchandising. Well-established cold-chain infrastructure and growing acceptance of advanced preservation solutions further encourage MAP adoption, supporting its widespread application and reinforcing North America's position within the fresh produce packaging industry.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, driven by urbanization, improving consumer purchasing power, expanding organized retail, and stronger demand for convenient fresh produce. Development of cold-chain networks and rapid growth of grocery delivery and e-commerce are increasing the need for packaging that protects perishable products. Greater investment in food processing facilities, modern packaging technologies, and distribution infrastructure is further supporting MAP adoption and helping businesses preserve produce quality across increasingly extensive supply chains.

Key players in the market

Some of the key players in Modified Atmosphere Packaging (MAP) for Fresh Produce Market include Transfresh, StePacPPC, Amcor Plc, Sealed Air Corporation, Berry Global Inc., Klockner Pentaplast (kp), Mondi Group, Linde AG, MULTIVAC Group, Winpak Ltd., Coveris Holdings S.A., Smurfit Kappa Group, Crown Holdings Inc., Air Products and Chemicals Inc., ProAmpac, Graphic Packaging International, Multisorb Technologies Inc. and Pactiv Evergreen Inc.

Key Developments:

In April 2025, Amcor plc announced the successful completion of its all-stock combination with Berry Global, effective. Through this combination, Amcor enhances its position as a global leader in consumer and healthcare packaging solutions with the unique material science and innovation capabilities required to revolutionize product development and meet customers' and consumers' sustainability aspirations.

In February 2025, Berry Global Group, Inc. collaborated with snacks and treats leader Mars to transition its pantry jars for M&M'S®, SKITTLES® and STARBURST® brands to 100% recycled plastic packaging, exclusive of jar lids. This achievement advances the ongoing collaboration between Berry and Mars to develop packaging made with recycled content, and builds on a previous launch of the pantry jars with 15% recycled plastic in 2022. The updated jars are now rolling out across the country.

Product Types Covered:

Fruits

Vegetables

Exotic Produce

Packaging Materials Covered:

Polyethylene (PE)

Polypropylene (PP)

Polyvinyl Chloride (PVC)

Ethylene Vinyl Alcohol (EVOH)

Other Packaging Materials

Technologies Covered:

Active MAP

Passive MAP

Intelligent & Sensor-enabled MAP

Packaging Formats Covered:

Bags & Pouches

Trays & Clamshells

Films & Wraps

Boxes & Cartons

Distribution Channels Covered:

Supermarkets & Hypermarkets

Convenience Stores

Online Retail & E-commerce

Specialty Stores

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of 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 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

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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Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) Regions are also represented in the same manner as above.

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