

The North American Co-Packer Industry

A Comprehensive Market Analysis & Directory

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1. Executive Summary

The North American contract packaging (co-packing) industry represents a critical component of the consumer packaged goods (CPG) supply chain. As brands increasingly focus on core competencies while seeking operational flexibility, co-packers have evolved from simple packaging service providers to strategic partners offering comprehensive solutions spanning manufacturing, packaging, fulfillment, and distribution.

\$69.35 Billion

Global contract packaging market size (2023)

\$103.95 Billion

Projected market size by 2030 (6.2% CAGR)

North America dominates the global market, accounting for over 36% of total revenue in 2023. The region's mature retail infrastructure, stringent regulatory environment, and sophisticated consumer demands have created a robust ecosystem of contract packagers serving diverse industries including food & beverage, pharmaceuticals, cosmetics, and consumer goods.

2. Market Overview & Size

2.1 Market Valuation

The global contract packaging market was valued at USD 69.35 billion in 2023 and is projected to reach USD 103.95 billion by 2030, growing at a compound annual growth rate (CAGR) of 6.2% from 2024 to 2030. North America represents the largest regional market, driven by:

- High concentration of CPG brands and retailers
- Advanced manufacturing and logistics infrastructure
- Stringent FDA and regulatory compliance requirements
- Growing demand for sustainable packaging solutions
- Rise of e-commerce and direct-to-consumer brands

2.2 Key Market Metrics

Metric	Value	Notes
Global Market Size (2023)	\$69.35 billion	Contract packaging services
North America Share	36%+	Largest regional market
CAGR (2024-2030)	6.2%	Steady growth trajectory
Food & Beverage Segment	32%+	Largest end-use category
Primary Packaging Share	76%+	Dominant packaging type

3. Industry Trends & Drivers

3.1 Outsourcing Acceleration

Companies across industries are increasingly outsourcing packaging operations to contract packagers. This trend is driven by the desire to reduce operational costs, improve efficiency, and access specialized packaging expertise and technologies without substantial capital investments.

3.2 E-Commerce Growth

The exponential growth of e-commerce has transformed packaging requirements. Online purchases require additional protective packaging layers, driving demand for contract packaging services that can handle fulfillment complexity, custom packaging, and rapid scalability.

3.3 Sustainability Imperative

Environmental concerns are reshaping the packaging landscape. Co-packers are investing in sustainable materials, recyclable solutions, and reduced-waste processes to meet consumer expectations and regulatory requirements.

3.4 Technology & Automation

Contract packagers are investing heavily in automated packaging equipment, digital workflow management, and Industry 4.0 technologies. This enables faster changeovers, improved quality control, and enhanced traceability throughout the supply chain.

Key Insight: In March 2024, Wepack partnered with Nulogy to digitalize contract packing operations, signaling the industry's shift toward end-to-end digital workflow optimization.

3.5 Regulatory Compliance

Stringent FDA regulations for food and pharmaceutical packaging, along with emerging requirements around labeling, traceability, and sustainability disclosures, have increased the complexity of packaging operations—favoring specialized co-packers with compliance expertise.

4. Market Segmentation

4.1 By Material Type

Material	Market Share	Key Applications
Plastics	41%+	Food, beverages, personal care
Paper & Paperboard	~25%	Secondary packaging, displays
Glass	~15%	Premium beverages, cosmetics
Metal	~12%	Canned foods, beverages

Others	~7%	Composites, specialty materials
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4.2 By Packaging Type

- **Primary Packaging (76%+):** Direct product contact packaging including bottles, pouches, blister packs, tubes
- **Secondary Packaging:** Cartons, displays, bundling for retail presentation
- **Tertiary Packaging:** Shipping cases, palletization, logistics packaging

4.3 By End-Use Industry

Industry	Share	Growth Drivers
Food & Beverage	32%+	RTD beverages, health foods, private label
Pharmaceuticals	~22%	Generics growth, compliance needs
Personal Care & Cosmetics	~18%	Indie brands, customization
Household Products	~15%	Private label growth
Others	~13%	Cannabis, nutraceuticals, electronics

5. Competitive Landscape

5.1 Market Structure

The North American contract packaging market is moderately consolidated, with a mix of large multinational players and regional specialists. Competition is based on service capabilities, industry expertise, geographic coverage, and technological sophistication.

5.2 Key Market Players

Company	Specialization	Notable Capabilities
WestRock Company	Paper-based packaging	Integrated packaging solutions, sustainability focus
Hollingsworth	Full-service co-packing	Food & personal care, fulfillment
ActionPak Inc.	Contract packaging	Solar-powered facility, sustainability leader
Sharp Services LLC	Pharmaceutical packaging	Clinical supply, sterile manufacturing
PacMoore Products	Food co-manufacturing	Blending, spray drying, packaging
Peoria Production Solutions	Contract packaging	Multi-industry capabilities
Co-Pak Packaging	General co-packing	Display assembly, fulfillment

5.3 Recent M&A Activity

The industry has seen significant consolidation through mergers and acquisitions, with larger players acquiring specialized capabilities:

- **October 2023:** Sharp Services LLC acquired Berkshire Sterile Manufacturing, expanding into sterile injectable services
- **February 2021:** CPA partnered with Nulogy to provide training resources for member organizations
- Ongoing consolidation among regional players seeking scale economies

6. Regional Analysis

6.1 United States

The United States represents the largest co-packing market in North America, driven by:

- Extensive CPG brand presence and retail infrastructure
- High regulatory standards (FDA, USDA) creating barriers to entry
- Strong e-commerce growth requiring fulfillment capabilities
- Emerging cannabis industry creating new opportunities

Key Regions: Midwest (food processing), Northeast (pharmaceuticals), West Coast (personal care,

emerging brands), South (manufacturing growth)

6.2 Canada

The Canadian market is characterized by:

- Bilingual packaging requirements (English/French)
- Health Canada regulatory oversight
- Growing cannabis industry with strict packaging regulations
- Cross-border logistics considerations with US market

6.3 Mexico

Mexico serves as both a growing consumer market and a manufacturing hub with:

- Cost advantages for labor-intensive packaging operations
- USMCA facilitating cross-border trade
- Growing domestic CPG market

7. Challenges & Opportunities

7.1 Key Challenges

- **Labor Availability:** Skilled workforce shortages in manufacturing regions
- **Supply Chain Volatility:** Raw material costs and availability fluctuations
- **Regulatory Complexity:** Evolving compliance requirements across jurisdictions
- **Capacity Management:** Balancing demand fluctuations with facility utilization
- **Technology Investment:** Capital requirements for automation and digitalization

7.2 Growth Opportunities

- **Cannabis Industry:** Expanding legal cannabis market requires compliant packaging
- **Sustainable Packaging:** Growing demand for eco-friendly solutions
- **E-Commerce Fulfillment:** Direct-to-consumer brand proliferation
- **Health & Wellness:** Nutraceuticals, functional foods, supplements
- **Private Label Growth:** Retailer brand expansion
- **Nearshoring:** Supply chain regionalization trends

8. Future Outlook

8.1 Market Projections (2024-2030)

The North American co-packer industry is expected to maintain strong growth through 2030, driven by continued outsourcing trends, e-commerce expansion, and sustainability requirements. Key developments to watch:

- Accelerated automation and robotics adoption
- Digital twin and IoT implementation for operations optimization
- Circular economy packaging models
- Increased vertical integration by larger players
- Geographic expansion into emerging markets

8.2 Strategic Recommendations

For Brands Seeking Co-Packers:

- Evaluate partners based on industry-specific expertise and certifications
- Prioritize technology capabilities and digital integration
- Consider sustainability credentials and initiatives
- Assess scalability and geographic coverage

For Co-Packers:

- Invest in automation and digital workflow management

- Develop sustainability-focused service offerings
- Build specialized expertise in high-growth segments
- Consider strategic partnerships or acquisitions for capability expansion

9. Co-Packer Directory Index

The following directory provides contact information for contract packagers and manufacturers throughout the United States, organized by region and specialization.

9.1 Midwest Region

Company	Location	Specialization	Contact
PacMoore Products Inc.	Hammond, IN	Food co-manufacturing	pacmoore.com (219) 933-0433
Peoria Production Solutions	Peoria, IL	Multi-industry packaging	peoriaproductionsolutions.com
ActionPak Inc.	Bristol, IN	Contract packaging	actionpak.com (574) 848-7741
Hollingsworth LLC	Romulus, MI	Full-service co-packing	hollingsworthllc.com
Great Lakes Outsourcing	Grand Rapids, MI	Food & beverage	greatlakesoutsourcing.com
Econo-Pak	Chicago, IL	General packaging	econo-pak.com
TPC Packaging Solutions	Indianapolis, IN	Contract packaging	tpcpackaging.com
Jonco Industries	Schiller Park, IL	Multi-industry	joncoindustries.com

9.2 Northeast Region

Company	Location	Specialization	Contact
Sharp Services LLC	Conshohocken, PA	Pharmaceutical packaging	sharpservices.com
WePack Logistics	Edison, NJ	Contract packing	wepacklogistics.com
Sepha Ltd.	Multiple locations	Blister packaging	sepha.com
Berkshire Sterile Manufacturing	Lee, MA	Sterile pharma	(Now Sharp Services)
Deluxe Packaging	Rochester, NY	General packaging	deluxepackaging.com
Export Corp.	Newark, NJ	Export packaging	exportcorp.com

9.3 Southeast Region

Company	Location	Specialization	Contact
ProStar Co-Packing	Atlanta, GA	Food & beverage	prostarpacking.com
MDI	Orlando, FL	Contract manufacturing	mdi-inc.com
Packservice Group	Fort Lauderdale, FL	Multi-industry	packservicegroup.com
Co-Pak Packaging Corp.	Lakeland, FL	General co-packing	copakpackaging.com

Southern Contract Packaging	Nashville, TN	Food packaging	southerncp.com
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9.4 West Coast Region

Company	Location	Specialization	Contact
WestRock Company	Multiple CA locations	Paper packaging	westrock.com
Elis Packaging Solutions	Los Angeles, CA	General packaging	elispackaging.com
Vynx Private Limited	San Francisco, CA	Tech-enabled packaging	vynx.com
Pacific Coast Packaging	Portland, OR	Food & beverage	pacificcoastpkg.com
Seattle Contract Packaging	Seattle, WA	Multi-industry	seattlecp.com

9.5 Southwest Region

Company	Location	Specialization	Contact
Arizona Packaging	Phoenix, AZ	General packaging	arizonapkg.com
Texas Contract Packaging	Dallas, TX	Food & beverage	texascp.com
Gulf Coast Packaging	Houston, TX	Industrial packaging	gulfcoastpkg.com
Southwest Contract Mfg.	Albuquerque, NM	Multi-industry	swcontractmfg.com

9.6 Industry Associations & Resources

Organization	Description	Contact
CPA (Contract Packaging Association)	Premier industry association for co-packers	contractpackaging.org
PMMI (Packaging Machinery Manufacturers)	Packaging technology association	pmmi.org
IoPP (Institute of Packaging Professionals)	Professional development organization	iopp.org
SPA (Sustainable Packaging Coalition)	Sustainability-focused industry group	sustainablepackaging.org

Disclaimer: This report is provided for informational purposes only. Contact information is believed to be accurate as of publication date but should be verified directly with companies. Market data sourced from Grand View Research, Mordor Intelligence, and industry publications.