



[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table & Chart 5](#)

[Sample Profile, Table & Forecast 6](#)

[Order Form 7](#)

[About Freedonia, Custom Research, Related Studies, Corporate Use License 8](#)

World Protective Packaging

Industry Study with Forecasts for **2014 & 2019**

Study #2651 | June 2010 | \$5800 | 380 pages

www.freedoniagroup.com



The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
World Economic Overview	5
Recent Historical Trends	6
Macroeconomic Outlook	8
World Demographic Outlook	12
Population	12
Households	14
Urbanization Patterns	15
World Personal Income & Expenditure Trends	17
World Manufacturing Outlook	19
World Internet & Catalog Sales Outlook	24
World Packaging Industry Outlook	26
World Corrugated Box Industry Overview	29
World Plastic Industry Overview	32
Pricing Trends	34
Environmental Issues	37
Regulatory Considerations	41

OVERVIEW

General	44
Demand by Region	45
Demand by Product	48
Foamed Plastics	50
Paperboard Protectors	52
Protective Mailers	54
Other Protective Packaging	56
Demand by Material	60
Paper & Paperboard	61
Foamed Plastics	62
Plastic Films & Other Plastics	63
Demand by Function	63
Cushioning	65
Blocking & Bracing	66
Void-Filling	68
Wrapping	69
Insulation	70
Demand by Market	71
Manufacturing	73
Internet & Catalogs	75
Retail & Other	77
World Production & Trade Overview	80

NORTH AMERICA

General	83
Protective Packaging Demand	84
United States	87
Canada	94
Mexico	98

WESTERN EUROPE

General	104
Protective Packaging Demand	105
Belgium	108
France	112
Germany	116

Italy	122
Netherlands	126
Spain	130
United Kingdom	134
Other Western Europe	140

ASIA/PACIFIC

General	146
Protective Packaging Demand	148
Australia	150
China	154
India	160
Indonesia	165
Japan	169
South Korea	174
Taiwan	178
Thailand	183
Other Asia/Pacific	187

OTHER REGIONS

Central & South America	192
Argentina	195
Brazil	199
Other Central & South America	203
Eastern Europe	207
Poland	210
Russia	214
Other Eastern Europe	218
Africa/Mideast	222
South Africa	226
Turkey	230
Other Africa/Mideast	234

INDUSTRY STRUCTURE

General	239
Market Share	242
Acquisitions & Divestitures	246
Marketing Strategies	250
Channels of Distribution	251
Competitive Strategies	254
Cooperative Agreements	257

COMPANY PROFILES

ACH Foam Technologies	262
Advanced Protective Packaging	264
BASF SE	265
Bayer AG	267
Broadway Industrial	269
Carpenter Company	270
Cascades Incorporated	272
Coldpack SAS	274
Cretec Corporation	275
Foam Fabricators	277
Free-Flow Packaging International	279
FROMM Holding	282
Great Northern	284
Green Light Products	286
Huhtamaki Oyj	287
Illinois Tool Works	289
IntelliPack Asia Pacific	293

International Dunnage Sanayi ve Ticaret	294
JMP Holdings	295
Kewell Converters	297
MeadWestvaco Corporation	298
Menasha Corporation	300
Nampak Limited	302
Nefab AB	304
NOVA Chemicals	306
ORiON Flexi Pack	309
Packshield Industries	310
Polyair Inter Pack	311
Pregis Corporation	314
Ranpak Corporation	320
Ring Companies	322
Rock-Tenn Company	323
Sealed Air	327
Shanghai Xiangzhi Paper	334
Sonoco Products	335
Specialized Packaging Group	339
Storopack Hans Reichenecker	343
Svenska Cellulosa	346
Tegant Corporation	350
3M Company	355
UFP Technologies	356
Zotefoams plc	359
Additional Companies Mentioned in the Study	361

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table	3
-----------------------	---

MARKET ENVIRONMENT

1 World Gross Domestic Product by Region ..	11
2 World Population by Region	13
3 World Households by Region	15
4 World Urban Population by Region	17
5 World per Capita GDP by Region	19
6 World Manufacturing Value Added by Region	21
Cht Protective Packaging Demand/MVA Relationship, 2009	23
7 World Internet & Catalog Sales by Region ..	26
8 World Corrugated Box Demand by Region ..	32
9 World Plastic Resin Production by Region ..	34

OVERVIEW

1 World Protective Packaging Demand by Region	47
Cht World Protective Packaging Demand by Region, 2009	48
2 World Protective Packaging Demand by Product	49
Cht World Protective Packaging Demand by Product, 2009	50
3 World Foamed Plastic Protective Packaging Demand by Region	52

(continued on following page)

List of Tables/Charts

4	World Paperboard Protector Demand by Region	54
5	World Protective Mailer Demand by Region	56
6	World Other Protective Packaging Demand by Region & Product.....	59
7	World Protective Packaging Demand by Material.....	60
Cht	World Protective Packaging Demand by Material, 2009	61
8	World Protective Packaging Demand by Function.....	64
Cht	World Protective Packaging Demand by Function, 2009	65
9	World Protective Packaging Demand by Market	72
Cht	World Protective Packaging Demand by Market, 2009.....	73
10	World Manufacturing Market for Protective Packaging by Region.....	75
11	World Internet & Catalog Market for Protective Packaging by Region.....	77
12	World Retail & Other Markets for Protective Packaging by Region.....	79

NORTH AMERICA

1	North America -- Protective Packaging Market Environment	84
2	North America -- Protective Packaging Demand by Product & Market	86
Cht	North America -- Protective Packaging Demand by Country, 2009.....	87
3	United States -- Protective Packaging Market Environment	89
4	United States -- Protective Packaging Demand by Product & Market	91
5	Canada -- Protective Packaging Market Environment	95
6	Canada -- Protective Packaging Demand by Product & Market	97
7	Mexico -- Protective Packaging Market Environment	100
8	Mexico -- Protective Packaging Demand by Product & Market	102

WESTERN EUROPE

1	Western Europe -- Protective Packaging Market Environment	105
2	Western Europe -- Protective Packaging Demand by Product & Market	107
Cht	Western Europe -- Protective Packaging Demand by Country, 2009.....	108
3	Belgium -- Protective Packaging Market Environment	110
4	Belgium -- Protective Packaging Demand by Product & Market	111
5	France -- Protective Packaging Market Environment	113
6	France -- Protective Packaging Demand by Product & Market	115

7	Germany -- Protective Packaging Market Environment	118
8	Germany -- Protective Packaging Demand by Product & Market	120
9	Italy -- Protective Packaging Market Environment	123
10	Italy -- Protective Packaging Demand by Product & Market	125
11	Netherlands -- Protective Packaging Market Environment	127
12	Netherlands -- Protective Packaging Demand by Product & Market	129
13	Spain -- Protective Packaging Market Environment	131
14	Spain -- Protective Packaging Demand by Product & Market	133
15	United Kingdom -- Protective Packaging Market Environment	136
16	United Kingdom -- Protective Packaging Demand by Product & Market	137
17	Other Western Europe -- Protective Packaging Market Environment.....	141
18	Other Western Europe -- Protective Packaging Demand by Product/Market	143

ASIA/PACIFIC

1	Asia/Pacific -- Protective Packaging Market Environment	148
2	Asia/Pacific -- Protective Packaging Demand by Product & Market	149
Cht	Asia/Pacific -- Protective Packaging Demand by Country, 2009.....	150
3	Australia -- Protective Packaging Market Environment	151
4	Australia -- Protective Packaging Demand by Product & Market	153
5	China -- Protective Packaging Market Environment	156
6	China -- Protective Packaging Demand by Product & Market	159
7	India -- Protective Packaging Market Environment	162
8	India -- Protective Packaging Demand by Product & Market	164
9	Indonesia -- Protective Packaging Market Environment	166
10	Indonesia -- Protective Packaging Demand by Product & Market	168
11	Japan -- Protective Packaging Market Environment	171
12	Japan -- Protective Packaging Demand by Product & Market	173
13	South Korea -- Protective Packaging Market Environment	176
14	South Korea -- Protective Packaging Demand by Product & Market	177
15	Taiwan -- Protective Packaging Market Environment	180
16	Taiwan -- Protective Packaging Demand by Product & Market	182
17	Thailand -- Protective Packaging Market Environment	184
18	Thailand -- Protective Packaging Demand by Product & Market	186

19	Other Asia/Pacific -- Protective Packaging Market Environment	188
20	Other Asia/Pacific -- Protective Packaging Demand by Product & Market	190

OTHER REGIONS

1	Central & South America -- Protective Packaging Market Environment.....	193
2	Central & South America -- Protective Packaging Demand by Product/Market	195
3	Argentina -- Protective Packaging Market Environment	197
4	Argentina -- Protective Packaging Demand by Product & Market	198
5	Brazil -- Protective Packaging Market Environment	200
6	Brazil -- Protective Packaging Demand by Product & Market	202
7	Other Central/South America -- Protective Packaging Market Environment.....	204
8	Other Central/South America -- Protective .. Packaging Demand by Product/Market	206
9	Eastern Europe -- Protective Packaging Market Environment	208
10	Eastern Europe -- Protective Packaging Demand by Product & Market	210
11	Poland -- Protective Packaging Market Environment	212
12	Poland -- Protective Packaging Demand by Product & Market	213
13	Russia -- Protective Packaging Market Environment	216
14	Russia -- Protective Packaging Demand by Product & Market	217
15	Other Eastern Europe -- Protective Packaging Market Environment.....	220
16	Other Eastern Europe -- Protective Packaging Demand by Product/Market	221
17	Africa/Mideast -- Protective Packaging Market Environment	224
18	Africa/Mideast -- Protective Packaging Demand by Product & Market	225
19	South Africa -- Protective Packaging Market Environment	227
20	South Africa -- Protective Packaging Demand by Product & Market	229
21	Turkey -- Protective Packaging Market Environment	232
22	Turkey -- Protective Packaging Demand by Product & Market	233
23	Other Africa/Mideast -- Protective Packaging Market Environment.....	236
24	Other Africa/Mideast -- Protective Packaging Demand by Product/Market	237

INDUSTRY STRUCTURE

1	Protective Packaging Sales by Company, 2009.....	240
Cht	World Protective Packaging Market Share, 2009	243
2	Selected Acquisitions & Divestitures.....	249
Cht	Protective Packaging Industry Flowchart	253
3	Selected Cooperative Agreements.....	259

Growth in protective packaging demand will be driven by an upswing in manufacturing activity and the continued proliferation of Internet shopping in both developed and developing regions.

Global demand to grow 7.8% yearly through 2014

World demand for protective packaging is projected to increase 7.8 percent per year to \$22.2 billion in 2014. This represents a notable acceleration from the pace of the 2004-2009 period. Advances will be stimulated by an upswing in manufacturing activity and the continued proliferation of Internet shopping in both developed and developing regions. These factors will necessitate heightened requirements for cost-effective packaging used in the protection of goods from shock, vibration, abrasion and other damaging effects of shipping and handling.

Developing regions to see most rapid increases in demand

While the US is by far the world's largest user of protective packaging, the most rapid increases will occur in developing regions. The Asia/Pacific region, Central and South America, and the Africa/Mideast region will all outpace the global average. Population growth, greater urbanization, industrialization trends and increases in international trade activity will support advances in these regions' generally underdeveloped packaging sectors. Rising consumer income levels and expanding middle classes will also generate robust internal demand for packaged consumer goods, boosting protective packaging requirements. Some of the best growth opportunities



will occur in Asia, which is expected to see double-digit annual growth through the forecast period. In particular, China alone is expected to account for one-quarter of global value gains in protective packaging demand between 2009 and 2014.

Protective mailers, air pillows, bubble packaging to grow the fastest

Overall, foamed plastic protective packaging will remain the largest product type by a wide margin. Demand will be aided by foamed plastic's light weight and excellent cushioning capabilities compared to paperboard and other materials. However, the growing empha-

sis on packaging sustainability -- especially in developed countries with more established environmental regulations -- will constrain opportunities for conventional foamed plastic protective packaging to some extent. Protective mailers and other protective packaging products such as air pillows and bubble packaging will continue to experience the fastest gains. Among factors driving growth will be performance and environmental advantages, as well as a continued robust outlook for electronic commerce, which will fuel the need for packaging products offering enhanced resistance to impact, abrasion and temperature changes during movement of goods through the supply chain.

Copyright 2010 The Freedonia Group, Inc.

[Click here to purchase online](#)

Sample Text, Table & Chart

MARKETS

India: Protective Packaging Demand

Demand for protective packaging in India totaled \$ 2009, accounting for five percent of the regional market. represents a relatively underdeveloped packaging market its huge, impoverished and mostly rural population. Per levels remain very low, by both regional and global standards result, per capita spending on packaged goods is minimal the use of cheap and/or reusable packaging alternatives, paper, jute bags and wood crates, in lieu of more expensive packaging will also limit demand.

Nonetheless, while the usage intensity of protective packaging in India is among the lowest in the world, demand is experiencing fast growth. Demand will continue to be fueled by rapid development in the country's manufacturing sector. Gains will also be propelled by the expansion of India's urban middle classes, the primary consumers of packaged products. In addition, strong growth in the number of retail stores as well as the number of online shoppers will continue to boost demand for protective packaging.

Through 2014, protective packaging demand in India is projected to increase at a robust 10.5 million. This represents one of the most rapid growth rates over the forecast period -- albeit from a much smaller base compared to the US or China). Strong manufacturing activity, growth in packaged goods and use of environmentally friendly packaging will also fuel growth as the role of market equipment will improve product quality, further bolstering packaging sales

162

Copyright 2010

SAMPLE
TEXT

TABLE VI-7

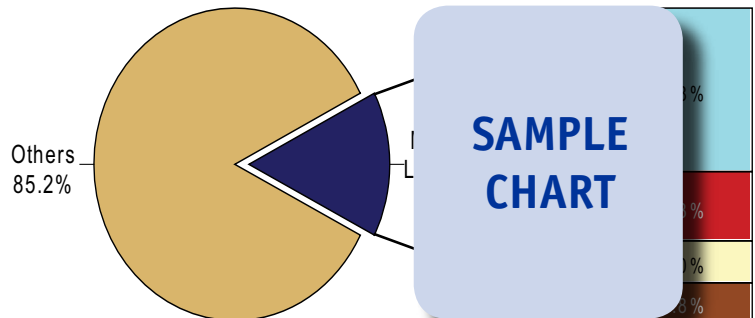
INDIA -- PROTECTIVE PACKAGING MARKET ENVIRONMENT

Item	1999	2004	2009	2014	2019
Population (million persons)					
\$ GDP/capita					
Gross Domestic Product (bil 2008\$)					
% manufacturing					
Manufacturing Value Added (bil 2008\$)					
\$ protective packaging/000\$ MVA					
Protective Packaging Demand (mil \$)					
% India					
Asia/Pacific Protective Packaging (mil \$)					

SAMPLE
TABLE

CHART VIII-1

WORLD PROTECTIVE PACKAGING MARKET SHARE (\$15.3 billion, 2009)

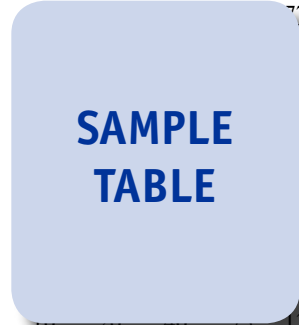


SAMPLE
CHART

Sample Profile, Table & Forecast

TABLE VI-8
INDIA -- PROTECTIVE PACKAGING DEMAND
BY PRODUCT & MARKET
(million dollars)

Item	1999	2004	2009	2014	2019
Protective Packaging Demand					775
By Product:					
Foamed Plastics					90
Paperboard Protectors					40
Protective Mailers					85
Other Protective Packaging					50
By Market:					
Manufacturing					75
Internet & Catalogs					70
Retail & Other Markets	10	20	40	75	130



COMPANY PROFILES

Polyair Inter Pack Incorporated

330 Humberline Drive
 Toronto, Ontario M9W 1R5
 Canada
 416-679-6600
 http://www.po



Annual Sales:
 Employment:

Key Products: and packaging systems

Polyair Inter Pack is a privately held manufacturer of packaging, insulation products and pool covers. In July 2009, the Company was acquired by Glencoe Skydome Holdings LP (Chicago, Illinois), an operating unit of Glencoe Capital LLC (Chicago, Illinois).

The Company participates in the world protective packaging industry through the manufacture of various packaging products. Specific items comprise bubble material, foam products, mailers and packaging systems.

Products -- Bubble material from Polyair is marketed under the DURABUBBLE brand name. DURABUBBLE material, which is offered in standard and antistatic types, features 1/2-, 4/5-, and 1-1/4-centimeter bubble heights. It manufactures such DURABUBBLE dispensers as BOX-A-BUBBLE, which is an octagonal-shaped carton containing a 1-1/5-meter-wide roll of DURABUBBLE perforated at 30-1/2 centimeters for convenient tear-off sheets; and HANDI-PAK products that dispense DURABUBBLE in 30-1/2- or -centimeter widths for use in retail stores, mail rooms, warehouses or other uses.

"... faster gains will be precluded by the low levels of personal income and the low percentage of urban population (only 30 percent in India in 2009, compared to the regional average of 41 percent, and 51 percent worldwide). While the number of supermarkets will swiftly multiply in larger cities, most areas in the country will remain too poor and lacking in resources to support a large retail industry (both traditional and online), which will limit protective packaging requirements."
 --Section VI, pg. 163

OTHER STUDIES

Degradable Plastics

US demand for degradable plastics is forecast to rise 16.6% annually to 2014, driven by interest in environmentally friendly products. Polylactic acid (PLA) and starch-based plastics will remain the dominant types and see strong growth. Polyhydroxyalkanoate (PHA) will be the fastest growing type, from a small base. This study analyzes the 151 million pound US degradable plastic industry, with forecasts for 2014 and 2019 by type, product and market. It also evaluates company market share and profiles industry players.
 #2648 August 2010 \$4800

Protective Packaging

US demand for protective packaging is forecast to climb 6.2% annually through 2014, driven in part by the continued proliferation of Internet shopping. Value gains will be helped by greater interest in recycled or biodegradable materials. The fastest growth is expected for air pillows, foamed plastics and bubble packaging. This study analyzes the \$3.8 billion US protective packaging industry, with forecasts for 2014 and 2019 by function, market and product. It also evaluates company market share and profiles industry players.
 #2619 March 2010 \$4800

Corrugated & Paperboard Boxes

US corrugated and paperboard box demand will rise 2.4% yearly through 2014. Gains will be driven in part by higher-value types with better graphics capabilities, including folding cartons and corrugated boxes. Internet-based shopping will also support box demand. Durable goods will be the fastest growing market. This study analyzes the \$32.3 billion US corrugated and paperboard box industry, with forecasts for 2014 and 2019 by material, product and market. It also evaluates company market share and profiles industry players.
 #2598 March 2010 \$4800

Foamed Plastics

US foamed plastics demand will reach 8.4 billion pounds in 2013 as key construction and motor vehicle markets recover. Foamed urethane will remain the largest segment while foamed LDPE grows the fastest. Construction will provide the best opportunities based on growth in insulation and carpet underlay applications. This study analyzes the \$22.5 billion US foamed plastics industry, with forecasts for 2013 and 2018 by market and product. It also evaluates company market share and profiles industry players.
 #2532 July 2009 \$4700

Active & Intelligent Packaging

US demand for active and intelligent packaging will climb 8.3% yearly through 2013, driven in part by food safety concerns and losses in perishables. Intelligent packaging will grow the fastest, propelled by time-temperature indicators and other products that offer product differentiation, traceability and interactive features. This study analyzes the \$1.3 billion US active and intelligent packaging industry, with forecasts for 2013 and 2018 by product and market. It also evaluates market share and profiles industry players.
 #2515 July 2009 \$4700

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

[Click here to learn more about Freedonia](#)

Freedonia Custom Research

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

[Click here to learn more about Custom Research](#)



[Click here for complete title list](#)

[Click here to visit freedoniagroup.com](http://www.freedoniagroup.com)