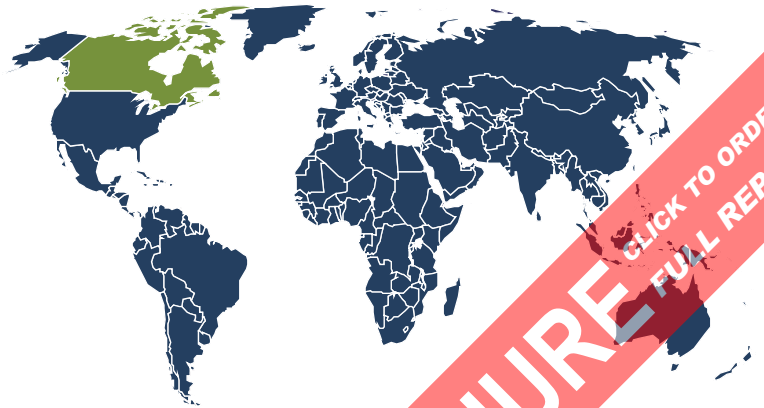




Freedonia Focus Reports  
Global Collection

# Protective Packaging: Canada

July 2019



**BROCHURE**  
CLICK TO ORDER  
FULL REPORT

[www.freedoniafocusreports.com](http://www.freedoniafocusreports.com)

# Table of Contents

---

<b>1. Highlights</b>	<b>3</b>
<b>2. Market Environment</b>	<b>4</b>
Historical Trends	4
Key Economic Indicators	6
Sustainability Issues	7
North America Regional Outlook	9
<b>3. Segmentation &amp; Forecasts</b>	<b>10</b>
Products	10
Flexible	11
Foam	11
Rigid	12
Markets	14
Durable Goods	15
Nondurable Goods	15
E-Commerce	15
Retail & Other Markets	16
<b>4. Industry Structure</b>	<b>18</b>
Industry Characteristics	18
Market Leaders	19
Sealed Air	19
Signode	20
Sonoco Products	20
<b>5. About This Report</b>	<b>22</b>
Scope	22
Sources	22
Industry Codes	23
Freedonia Methodology	23
Resources	25

# List of Tables & Figures

---

Figure 1   Canada: Key Trends in the Protective Packaging Market, 2018 – 2023	3
Figure 2   Canada: Protective Packaging Demand Trends, 2008 – 2018	4
Table 1   Canada: Key Indicators for Protective Packaging Demand, 2008 – 2023 (2017US\$ bil)	6
Figure 3   North America: Protective Packaging Demand by Country, 2018 (%)	9
Figure 4   Canada: Protective Packaging Demand by Product, 2008 – 2023 (US\$ mil)	10
Table 2   Canada: Protective Packaging Demand by Product, 2008 – 2023 (US\$ mil)	10
Figure 5   Canada: Protective Packaging Demand by Product, 2008 – 2023 (%)	13
Figure 6   Canada: Protective Packaging Demand by Market, 2008 – 2023 (US\$ mil)	14
Table 3   Canada: Protective Packaging Demand by Market, 2008 – 2023 (US\$ mil)	14
Figure 7   Canada: Protective Packaging Demand by Market, 2008 – 2023 (%)	17
Table 4   Canada: Selected Participants in the Protective Packaging Industry	19
Table 5   NAICS & SIC Codes Related to Protective Packaging	23

# About This Report

---

## Scope

This report forecasts to 2023 protective packaging demand in Canada in nominal US dollars at the manufacturer level. Total demand is segmented by product in terms of:

- flexible
- foam
- rigid

Total demand is also segmented by market as follows:

- durable goods
- nondurable goods
- e-commerce
- retail and other markets such as products sold to consumers and moving companies

To illustrate historical trends, total demand is provided in annual series from 2008 to 2018; the various segments are reported at five-year intervals for 2008, 2013, and 2018.

Excluded from the scope of this report are active insulated shipping containers employing electricity or other power sources to maintain a temperature-controlled environment inside an insulated enclosure. Retail packaging such as blister packs and clamshells are also excluded.

For any given historical year, US dollar amounts are obtained from values expressed in the applicable local currency. These local currency values are converted to US dollars at the average annual exchange rate for that year. For forecast years, the US dollar amounts assume the same annual exchange rate at that prevailing in 2018.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Protective Packaging: Canada* (FA30020) is based on *Global Protective Packaging*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers

## About This Report

- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

Table 5 | NAICS & SIC Codes Related to Protective Packaging

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
322211	Corrugated and Solid Fiber Box Mfg	2653	Corrugated and Solid Fiber Boxes
322220	Paper Bag and Coated and Treated Paper Mfg	2674	Bags – Uncoated & Multiwall
326140	Polystyrene Foam Product Mfg	3086	Plastic Foam Products
326150	Urethane and Other Foam Product (Except Polystyrene) Mfg	3089	Plastic Products, NEC
326199	All Other Plastics Product Mfg		

Source: US Census Bureau

## Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

## About This Report

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

## Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

## Resources

### The Freedonia Group

*Global Protective Packaging*

### Freedonia Industry Studies

*Corrugated & Paperboard Boxes*

*Global Bulk Packaging*

*Global E-Commerce*

*Global Pressure Sensitive Tapes*

*Produce Packaging Market in the US*

*Protective Packaging Market in the US*

*Retail-Ready Packaging*

### Freedonia Focus Reports

*Bulk Packaging: Canada*

*Converted Flexible Packaging: United States*

*E-Commerce: Canada*

*E-Commerce: United States*

*Global Food E-Commerce*

*Housing: Canada*

*Labels: United States*

*Meal Kits: United States*

*Online Grocery Shopping: United States*

*Packaging: United States*

*Pharmaceutical Packaging: Canada*

*Plastic Caps & Closures: Canada*

### Freedonia Custom Research

### Trade Publications

*Canadian Packaging*

*Internet Retailer*

*Packaging Digest*

*Packaging Strategies*

*Plastics News*

*Pulpapernews.com*

### Agencies & Associations

Canadian Corrugated and Containerboard Association

Canadian Plastics Industry Association

EPS Industry Alliance

## About This Report

Flexible Packaging Association  
Forest Products Association of Canada  
International Molded Fiber Association  
Statistics Canada  
United Nations Statistics Division  
World Bank