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US Collection

# Protective Packaging: United States

May 2020



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# Table of Contents

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<b>1. Highlights</b>	<b>3</b>
<b>2. Market Environment</b>	<b>5</b>
Historical Trends	5
Key Economic Indicators	7
Impact of COVID-19 Pandemic	8
Legal & Regulatory Factors	10
<b>3. Segmentation &amp; Forecasts</b>	<b>12</b>
Products	12
Flexible	13
Foam	14
Rigid	16
Markets	17
Durable Goods Manufacturing	18
Nondurable Goods Manufacturing	19
E-Commerce	20
Retail & Other Markets	21
<b>4. Industry Structure</b>	<b>23</b>
Industry Characteristics	23
Market Share	24
Sealed Air	25
Pregis	26
Crown Holdings (Signode)	27
<b>5. About This Report</b>	<b>28</b>
Scope	28
Sources	28
Industry Codes	29
Freedonia Methodology	29
Resources	31

# List of Tables & Figures

---

Figure 1   Key Trends in the US Protective Packaging Market, 2019 – 2024	4
Figure 2   US Protective Packaging Demand Trends, 2009 – 2019	5
Table 1   Key Indicators for US Protective Packaging Demand, 2009 – 2024 (US\$ bil)	7
Figure 3   US Protective Packaging Demand by Product, 2009 – 2024 (US\$ bil)	12
Table 2   US Protective Packaging Demand by Product, 2009 – 2024 (US\$ mil)	12
Figure 4   US Protective Packaging Demand by Product, 2009 – 2024 (%)	16
Figure 5   US Protective Packaging Demand by Market, 2009 – 2024 (US\$ bil)	17
Table 3   US Protective Packaging Demand by Market, 2009 – 2024 (US\$ mil)	17
Figure 6   US Protective Packaging Demand by Market, 2009 – 2024 (%)	22
Figure 7   US Protective Packaging Market Share by Company, 2019 (%)	24
Table 4   Leading Suppliers to the US Protective Packaging Market	25
Table 5   NAICS & SIC Codes Related to Protective Packaging	29

# About This Report

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## Scope

This report forecasts to 2024 US protective packaging demand 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 direct-to-consumer mail-order shipments that do not originate online from home shopping networks and pharmacies

To illustrate historical trends, total demand is provided in annual series from 2009 to 2019; the various segments are reported at five-year intervals for 2009, 2014, and 2019.

Excluded from the scope of this report are:

- active insulated shipping containers that employ power sources to maintain a temperature-controlled environment inside an insulated enclosure
- retail packaging, such as blister packs and clamshells

Insulated shipping systems – classified as insulated mailers for purposes of this report – are included as protective mailers, while containers that use materials other than foam as the insulating agent can be found in the other flexible protective packaging and other rigid protective packaging sections.

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: United States* (FF30020) is based on [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 Manufacturing	2653	Corrugated and Solid Fiber Boxes
322220	Paper Bag and Coated and Treated Paper Manufacturing	2672	Coated and Laminated Paper, NEC
326140	Polystyrene Foam Product Manufacturing	2674	Uncoated Paper and Multiwall Bags
326150	Urethane and Other Foam Product (Except Polystyrene) Manufacturing	2679	Converted Paper and Paperboard Products, NEC
326199	All Other Plastics Product Manufacturing	3086	Plastic Foam Products
		3089	Plastic Products, NEC

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.

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## Resources

### The Freedonia Group

*Protective Packaging*

### Freedonia Industry Studies

*Cannabis Packaging Opportunities*

*Converted Flexible Packaging*

*Food & Beverage Packaging Innovation*

*Global Bulk Packaging*

*Global Corrugated Boxes*

*Global E-Commerce*

*Global E-Commerce Packaging*

*Global Packaging Machinery*

*Global Pharmaceutical Packaging*

*Global Pressure Sensitive Tapes*

*Global Protective Packaging*

*Medical Device Packaging*

*Pressure Sensitive Tapes in the US*

*Produce Packaging Market in the US*

*Retail-Ready Packaging*

*Rigid Bulk Packaging*

*Specialty Films*

### Freedonia Focus Reports

*Converted Flexible Packaging: United States*

*E-Commerce: United States*

*Global Food E-Commerce*

*Labels: United States*

*Online Grocery Shopping: United States*

*Packaging Machinery: United States*

*Packaging: United States*

*Paper & Paperboard: United States*

*Pet Products & Services: United States*

*Plastic Foams: United States*

*Recovered Packaging: United States*

### Freedonia Custom Research

### Packaged Facts

*Meal Kits: Trends and Opportunities in the U.S.*

*Pet Product Packaging Innovation*

**Trade Publications**

*Digital Commerce 360*

*Ecommerce News Europe*

*Packaging Digest*

*Packaging Strategies*

*Plastics News*

*Pulpapernews.com*

**Agencies & Associations**

American Chemistry Council Plastics Division

American Forest and Paper Association

EPS Industry Alliance

Flexible Packaging Association

International Molded Fiber Association

United States Census Bureau

United States International Trade Commission