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US Collection

# Fresh Produce Packaging: United States

March 2021



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# About This Report

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## Scope

This report forecasts to 2024 US fresh produce packaging demand in nominal US dollars at the manufacturer level. Total demand is segmented by product in terms of:

- corrugated boxes
- plastic containers
- bags
- pouches
- trays and platters
- other products such as baskets, film, and reusable plastic containers

Total demand is also segmented by application as follows:

- vegetables
- fruit
- salad

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:

- canned and frozen fruits and vegetables
- packaging for nuts, herbs, seeds, spices, and other items commonly sold in produce departments other than fresh fruits and vegetables
- plastic and paper retail bags
- plastic bags provided in produce departments for customer self-service
- bag closures and separately sold lids
- rubber bands and twist ties
- restaurant and foodservice carryout containers, including those used for in-store prepared foods
- packaging used for canned, frozen, and dried fruits and vegetables
- pallet wrap
- corrugated displays other than bulk bins (i.e., freestanding or hanging displays designed to hold packaged goods)

## About This Report

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

*Fresh Produce Packaging: United States (FF30024)* is based on *Fresh Produce 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
- government/public agencies
- 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 and Packaged Facts

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 Fresh Produce 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	2672	Coated and Laminated Paper, NEC
326140	Polystyrene Foam Product Mfg	2674	Uncoated and Multiwall Bags
326199	All Other Plastics Product Mfg	2679	Converted Paper and Paperboard Products, NEC
		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.

## About This Report

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.

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

*Fresh Produce Packaging*

### Freedonia Industry Studies

*Converted Flexible Packaging in the US*  
*Corrugated & Paperboard Boxes*  
*Food & Beverage Packaging Innovation*  
*Food Containers in the US*  
*Food Safety in the US*  
*Foodservice Single-Use Products*  
*Global Bulk Packaging*  
*Global Corrugated Boxes*  
*Meat, Poultry, & Seafood Packaging*  
*Molded Pulp Packaging*  
*Plastic Film*  
*Pouches*  
*Retail Bags*  
*Retail-Ready Packaging*  
*Rigid Bulk Packaging*  
*Specialty Films*  
*Stretch & Shrink Film*

### Freedonia Focus Reports

*Barrier Films: United States*  
*Polyethylene: United States*  
*Polypropylene: United States*  
*Polystyrene: United States*  
*Specialty Films: United States*  
*Stretch & Shrink Film: United States*

### Freedonia Custom Research

### Packaged Facts

*Affluent Food Shoppers*  
*Consumer and Corporate Food Gifting in the U.S.*  
*Eating Trends: Cooking & Food Shopping*  
*Eating Trends: Mealtimes and Snacking*

### **Trade Publications**

*Flexible Packaging Magazine*

*Packaging Digest*

*Packaging Insights*

*Packaging Strategies*

*The Packer*

*Perishable News*

*Plastics News*

*Produce Business*

*Produce Grower*

*The Produce News*

*Progressive Grocer*

*PULPAPERnews.com*

*Supermarket Perimeter*

### **Agencies & Associations**

Consumer Brands Association

Fibre Box Association

Flexible Packaging Association

International Molded Fiber Association

Paperboard Packaging Council

United States Census Bureau

United States Department of Agriculture

United States Environmental Protection Agency

United States Food and Drug Administration

United States International Trade Commission