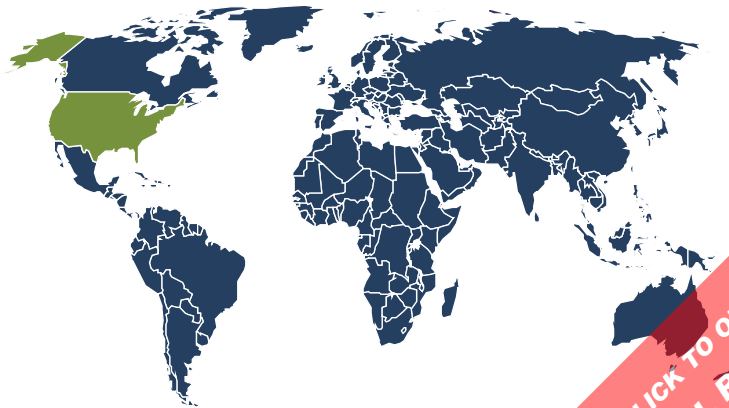




Freedonia Focus Reports
US Collection

Meat & Poultry Packaging: United States

March 2017



Highlights

Market Environment

Historical Trends | Key Economic Indicators | Technology
Regulatory and Environmental Factors

Segmentation and Forecasts

Products | Markets

Industry Structure

Industry Characteristics | Market Share

Resources

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ABOUT THIS REPORT

Scope & Method

This report forecasts US meat and poultry packaging demand in US dollars at the manufacturers' level to 2021. Total demand is segmented by product in terms of:

- rigid packaging
- flexible packaging
- packaging accessories.

For the purposes of this report, “meat” refers to animal products, excluding poultry and seafood, that are intended for human consumption (eg, beef, bison, lamb, pork, veal, etc). Poultry refers to domestic fowl (eg, chicken, turkey, duck, geese, etc) that are intended for human consumption. “Packaging” refers to any containers, wraps, or accessories contained in or attached to containers or wraps that are used to ship meat and poultry products to retail or foodservice locations.

Total demand is also segmented by market as follows:

- fresh and frozen
- processed
- ready-to-eat.

To illustrate historical trends, total demand is provided in annual series from 2006 to 2016; the various segments are reported at five-year intervals for 2006, 2011, and 2016.

This report 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.

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

Sources

Meat & Poultry Packaging: United States (FF30033) is based on *Meat Packaging Market in the US* and *Poultry Packaging Market in the US*, comprehensive industry studies published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international 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 6 | Industry Codes Related to Meat & Poultry Packaging

| NAICS/SCIAN 2007 | | SIC | |
|---|---|-------------------------|---|
| North American Industry Classification System | | Standard Industry Codes | |
| 311611 | Animal (except Poultry) Slaughtering | 2011 | Meat Packing Plants |
| 311612 | Meat Processed from Carcasses | 2013 | Sausages and Other Prepared Meat Products |
| 311615 | Poultry Processing | 2015 | Poultry Slaughtering and Processing |
| 322211 | Corrugated and Solid Fiber Box Mfg | 2653 | Corrugated and Solid Fiber Boxes |
| 322212 | Folding Paperboard Box Mfg | 2656 | Sanitary Food Containers, Except Folding |
| 322215 | Nonfolding Sanitary Food Container Mfg | 2657 | Folding Paperboard Boxes, Including Sanitary |
| 322221 | Coated and Laminated Packaging Paper Mfg | 2671 | Packaging Paper and Plastics Film, Coated and Laminated |
| 322225 | Laminated Aluminum Foil Mfg for Flexible Packaging Uses | 3221 | Glass Containers |
| 326112 | Plastics Packaging Film and Sheet (including Laminated) Mfg | 3411 | Metal Cans |
| 327213 | Glass Container Mfg | 3497 | Metal Foil and Leaf |
| 332431 | Metal Can Mfg | | |

Source: US Census Bureau

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Resources

The Freedonia Group

Freedonia Industry Studies

Poultry Packaging Market in the US, March 2017
Meat Packaging Market in the US, February 2017
Global Labels Market, January 2017
Retail Ready Packaging, July 2016
Corrugated & Paperboard Boxes, April 2016
Food Containers: Rigid & Flexible, February 2016
Pouches, February 2016
World Corrugated Boxes, November 2015
Active & Intelligent Packaging, October 2015
Foodservice Disposables, August 2015
Specialty Films, August 2015
Labels, June 2015

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Frozen Foods: United States
Gluten-Free Foods: United States
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Meat Packaging: United States
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Packaging: United States
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World Corrugated Boxes

Freedonia Custom Research

Trade Publications

Brand Packaging
Flexible Packaging
Food & Beverage Packaging
Food Technology
Meat & Poultry
National Provisioner
Packaging Digest
Packaging World

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Paperboard Packaging

Plastics News

Prepared Foods

Progressive Grocer

Refrigerated & Frozen Foods

Supermarket News

Agencies & Associations

American Chemistry Council

Can Manufacturers Institute

Fibre Box Association

Flexible Packaging Association

National Cattlemen's Beef Association

National Chicken Council

National Pork Board

National Turkey Federation

North American Meat Institute

United States Census Bureau

United States Department of Agriculture

United States Food and Drug Administration

United States International Trade Commission

World Trade Organization