

Freedonia Focus Reports
Global Collection



Global Protective Packaging

July 2019



CLICK TO ORDER
FULL REPORT

BROCHURE

CLICK TO ORDER
FULL REPORT

www.freedoniafocusreports.com

Table of Contents

| | |
|---|-----------|
| 1. Highlights | 3 |
| 2. Global Overview & Forecasts | 5 |
| Demand by Product | 5 |
| Flexible | 6 |
| Foam | 7 |
| Rigid | 7 |
| Demand by Market | 9 |
| Durable Goods | 10 |
| Nondurable Goods | 11 |
| E-Commerce | 11 |
| Retail & Other Markets | 12 |
| 3. Regional Segmentation & Forecasts | 14 |
| Regional Demand Overview | 14 |
| North America | 16 |
| Western Europe | 19 |
| Asia/Pacific | 22 |
| Other Regions | 25 |
| Central & South America | 26 |
| Eastern Europe | 27 |
| Africa/Mideast | 27 |
| 4. Industry Structure | 29 |
| Industry Characteristics | 29 |
| Market Share | 30 |
| Sealed Air | 31 |
| Signode Industrial Group | 32 |
| Storopack Hans Reichenecker | 32 |
| 5. About This Report | 33 |
| Scope | 33 |
| Sources | 34 |
| Industry Codes | 34 |
| Freedonia Methodology | 35 |
| Resources | 36 |

List of Tables & Figures

| | |
|---|----|
| Figure 1 Global Protective Packaging Market Outlook, 2018 – 2023 | 4 |
| Figure 2 Global Protective Packaging Demand by Product, 2008 – 2023 (US\$ mil) | 5 |
| Table 1 Global Protective Packaging Demand by Product, 2008 – 2023 (US\$ mil) | 5 |
| Figure 3 Global Protective Packaging Demand by Product, 2008 – 2023 (%) | 8 |
| Figure 4 Global Protective Packaging Demand by Market, 2008 – 2023 (US\$ mil) | 9 |
| Table 2 Global Protective Packaging Demand by Market, 2008 – 2023 (US\$ mil) | 9 |
| Figure 5 Global Protective Packaging Demand by Market, 2008 – 2023 (%) | 13 |
| Figure 6 Global Protective Packaging Demand by Region, 2008 – 2023 (US\$ mil) | 14 |
| Table 3 Global Protective Packaging Demand by Region, 2008 – 2023 (US\$ mil) | 14 |
| Figure 7 Global Protective Packaging Demand by Region, 2008 – 2023 (%) | 15 |
| Figure 8 North America: Protective Packaging Demand by Product, 2008 – 2023 (US\$ mil) | 16 |
| Figure 9 North America: Protective Packaging Demand by Market, 2008 – 2023 (US\$ mil) | 16 |
| Table 4 North America: Protective Packaging Demand by Product & Market, 2008 – 2023 (US\$ mil) | 17 |
| Figure 10 Western Europe: Protective Packaging Demand by Product, 2008 – 2023 (US\$ mil) | 19 |
| Figure 11 Western Europe: Protective Packaging Demand by Market, 2008 – 2023 (US\$ mil) | 19 |
| Table 5 Western Europe: Protective Packaging Demand by Product & Market, 2008 – 2023 (US\$ mil) | 20 |
| Figure 12 Asia/Pacific: Protective Packaging Demand by Product, 2008 – 2023 (US\$ mil) | 22 |
| Figure 13 Asia/Pacific: Protective Packaging Demand by Market, 2008 – 2023 (US\$ mil) | 22 |
| Table 6 Asia/Pacific: Protective Packaging Demand by Product & Market, 2008 – 2023 (US\$ mil) | 23 |
| Figure 14 Other Regions: Protective Packaging Demand by Region, 2008 – 2023 (US\$ mil) | 25 |
| Figure 15 Other Regions: Protective Packaging Demand by Market, 2008 – 2023 (US\$ mil) | 25 |
| Table 7 Other Regions: Protective Packaging Demand by Region & Market, 2008 – 2023 (US\$ mil) | 26 |
| Figure 16 Global Protective Packaging Market Share by Company, 2018 (%) | 30 |
| Table 8 Leading Suppliers to the Global Protective Packaging Market | 31 |
| Table 9 NAICS & SIC Codes Related to Protective Packaging | 34 |
| Table 10 HS Codes Related to Protective Packaging | 34 |

About This Report

Scope

This report forecasts to 2023 global demand for protective packaging by product, market, and major world region in nominal US dollars at the manufacturer level. Product segments include:

- flexible
- foam
- rigid

Reported markets encompass:

- durable goods
- nondurable goods
- e-commerce
- retail sales and other markets, such as protective mailers and bags

Major world regions include North America, Western Europe, Asia/Pacific, and all other regions.

To illustrate historical trends, world, product, market, and regional demand (including product and market segments) are provided for 2008, 2013, and 2018.

Excluded from the scope of this report are surface protection films and 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.

This report quantifies trends in terms of compound annual growth rates (CAGRs), which, by definition, employ in their calculation only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the trend beginning in the base year and ending in the forecast year. Forecasts are developed via the identification and analysis of pertinent statistical relationships and other historical trends and events, as well as their expected impact over the forecast period. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

About This Report

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

Global Protective Packaging (FW30020) is based on 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
- intergovernmental 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 9 | NAICS & SIC Codes Related to Protective Packaging

| NAICS/SCIAN 2017 North American Industry Classification System | | SIC 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 | Uncoated Paper and Multiwall Bags |
| 326140 | Polystyrene Foam Product Mfg | 3086 | Plastic Foam Products |
| 326150 | Urethane and Other Foam (Except Polystyrene) Mfg | 3089 | Plastic Products, NEC |
| 326199 | All Other Plastics Product Mfg | | |

Source: US Census Bureau

Table 10 | HS Codes Related to Protective Packaging

| HS Code | Definition |
|---------|--|
| 3920 | Plastic plate, sheet, film, not cellular |
| 3921 | Plastic plate, sheet, film, foil, strip, cellular |
| 4804 | Uncoated kraft paper & paperboard |
| 4805 | Uncoated paper & paperboard, NES |
| 4808 | Paper & board corrugated, creped, crinkled, embossed, perforated |

Source: United Nations Statistics Division

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.

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 Market

Freedonia Industry Studies

Corrugated & Paperboard Boxes

Global Bulk Packaging

Global E-Commerce

Global E-Commerce Packaging

Global Pharmaceutical Packaging

Global Pressure Sensitive Tapes

Produce Packaging Market in the US

Protective Packaging Market in the US

Retail E-Commerce Packaging Market in the US

Retail-Ready Packaging in the US

World Packaging Machinery

Freedonia Focus Reports

Converted Flexible Packaging: United States

E-Commerce: United States

Packaging: United States

Packaging Machinery: United States

Protective Packaging: United States

World Corrugated Boxes

Trade Publications

Ecommerce News Europe

Internet Retailer

Packaging Digest

Packaging Strategies

Plastics News

Agencies & Associations

EPS Industry Alliance

Flexible Packaging Association

Institute of Packaging Professionals

International Molded Fiber Association (IMFA)

UN Statistics Division

US Census Bureau