INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

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Meat, Poultry & Seafood Packaging

US Industry Study with Forecasts to **2011 & 2016**

Study #2176 | March 2007 | $4400 | 260 pages

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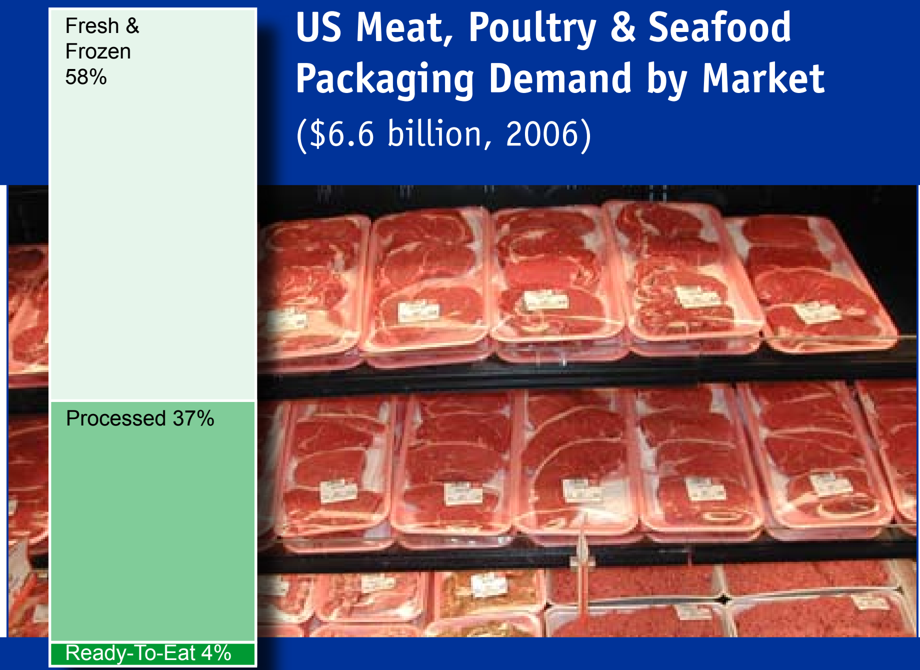
Consumer demand for more convenient foods that simplify preparation or storage will boost demand for processed meat, poultry and seafood, which tend to use more packaging per volume.

US demand to grow 4.2% annually through 2010

Demand for meat, poultry and seafood packaging is projected to increase 4.2 percent annually to over $8 billion in 2011. Gains will in part be attributable to increased meat, poultry and seafood production, with changes in packaging practices also providing opportunities. Processed goods, which tend to use more packaging relative to their volume than larger unprocessed cuts, will continue to experience strong demand resulting from growth in the number of smaller households and consumer demand for more convenient foods that simplify preparation or storage. The increased prevalence of case-ready meats and greater requirements for modified atmosphere packaging will also boost packaging demand.

US Meat, Poultry & Seafood Packaging Demand by Market
($6.6 billion, 2006)



Flexible packaging to outpace rigid types

Flexible packaging demand will outpace rigid packaging, expanding at a 4.5 percent annual pace to $3.3 billion in 2011. Growth will be driven by robust gains for pouches and continued healthy prospects for high barrier film. Pouch opportunities will result from the further penetration of retort pouches in place of cans, greater usage in initial launches of new products, and inroads by stand-up pouches in traditional bag applications for frozen meat, poultry and seafood. High barrier film demand will benefit from heightened requirements for value-added packaging materials for extended shelf life and protection from puncturing during shipping and handling.

While rigid packaging demand will benefit from meat production trends and favorable demographics, below-average gains will reflect maturity in the large corrugated box segment and further inroads into can and folding carton applications by pouches. Trays and plastic containers will grow the fastest based on shifts in the packaging mix toward these items. Offsetting tray growth somewhat will be shifts to trayless flexible packaging with fresh meat and poultry products. Industry and regulatory trends will favorably impact demand for packaging accessories such as labels, while absorbent pad prospects will be fueled by a shift to higher performing products.

Ready-to-eat market shows best prospects

Fastest advances are anticipated in the smaller ready-to-eat market, where growing demand for prepared foods will drive expanded availability of such foods by retailers. Despite the maturity of many processed meats, the processed market will expand in line with the overall industry average, driven by ongoing new product introductions of higher-margin, convenience-oriented processed items. The fresh and frozen market will expand more slowly, but will be aided by the increased prevalence of case-ready meats and the growing popularity of individually wrapped poultry and seafood.

Sample Text, Table & Chart

APPLICATIONS & MARKETS

Meat

Demand for packaging in meat applications is projected percent annually to ... th will be prop above-average gai ... creased preva meats sold in case- ... d requirement performing packag ... nd protection f turing during shipp ... ngoing health over fat and choles ... to a long-term in per capita consum ... ging prospects v from the increased availability of cuts of meat in smaller size formats to make meal preparation more convenient, as such p tend to be more highly packaged.

SAMPLE TEXT

Additionally, packaging demand will be bolstered by rec position as the leading main dish in many restaurants and the popularity of steakhouse and hamburger restaurants. The imp processed meats such as bacon, sausage, pepperoni and ham selves as well as components of other menu items (e.g., sand salads, pizza) will also stimulate favorable packaging opportunities. Although maturity and competition from alternative packaging formats in rigid packaging segments such as boxes and cans will limit further gains, areas of growth will be found. For instance, demand for display-ready boxes, which are higher priced than standard shipping boxes, will increase as a result of the expanded prevalence of case-ready meats and healthy prospects for club stores, which generally sell frozen and processed meats directly from corrugated boxes.

While fresh and frozen markets will advance closer to the meat packaging average, faster growth is expected in the significantly smaller ready-to-eat market, the result of consumer willingness to pay for convenience, which will lead to wider prepared meat offerings in supermarkets, warehouse clubs and other retail stores. Despite health concerns

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TABLE V-4

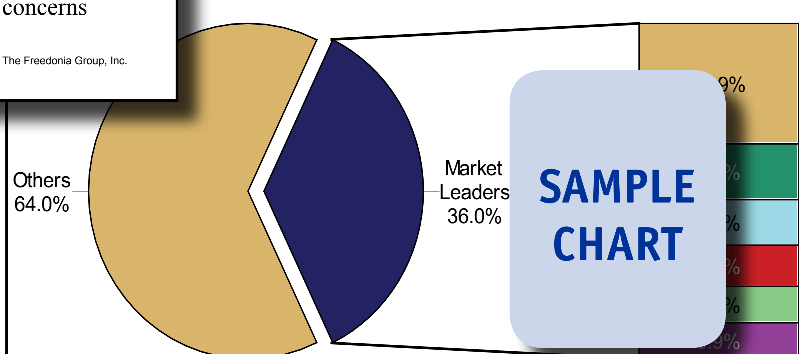
SEAFOOD PACKAGING DEMAND BY TYPE & MARKET (million dollars)

Item	1996	2001	2006	2011	2016
Seafood Shipments (bil $)	6.7	7.9	9.3	11.0	12.8
$ pkg/000$ seafood	62.2	58.9	61.8	65.0	69.9
Packaging Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Type:					
Rigid	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Boxes	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Cans	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Flexible	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Bags & Pouches	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Plastic Film	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Accessories	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Market:					
Fresh & Frozen	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Processed/Ready-to-Eat	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% seafood	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Total Meat, Poultry & Seafood Pkg	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

SAMPLE TABLE

CHART VI-1

US MEAT, POULTRY & SEAFOOD PACKAGING MARKET SHARE, 2006 ($6.6 billion)



Sample Profile, Table & Forecast

TABLE IV-3

BOX DEMAND IN MEAT, POULTRY & SEAFOOD PACKAGING
(million dollars)

Item	1996	2001	2006	2011	2016
Total Meat, Poultry & Seafood Pkg	4349	5259	6615	8110	9910
% boxes	41.5	39.6	36.4	34.2	32.2
Box Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Type:					
Corrugated	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Folding Cartons	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Application:					
Meat	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Poultry	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Seafood	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Market:					
Fresh & Frozen	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Processed & Ready-to-Eat	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% boxes	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Rigid Meat, Poultry & Seafood Pkg	2404	[illegible]	[illegible]	[illegible]	5190

SAMPLE TABLE

COMPANY PROFILES

Graphic Packaging Corporation
814 Livingston Court
Marietta, GA 30067
770-644-3000
http://www.graphicpackaging.com

Sales: $2 [illegible]
US/North [illegible]
Employ [illegible]

Key Pro [illegible] and other packaging

Gra [illegible] factures and markets paperboa [illegible] ications. It operates in two se [illegible] ainerboard/Other.

SAMPLE PROFILE

GPC participates in the US meat, poultry and seafood packaging industry through the Paperboard Packaging segment which generated sales of $2.3 billion in 2006. Through this segment, it is engaged in the manufacture of paperboard and paperboard packaging products, including folding cartons, for such industries as food, beverage, household products and tobacco. These products are made from coated unbleached kraft (CUK) paperboard and coated recycled paperboard (CRB).

Folding cartons consist of barrier layers that combine specialized laminates, film layers, metallized layers, package sealing, coatings and other materials for protection from such product-damaging hazards as oxygen, moisture, pests, oil and grease. Specific folding cartons and other paperboard packaging products suitable for packaging meat, poultry and seafood include TUX bacon cartons and MARAVAC vacuum packed bacon inserts, as well as cartons for packaging sausage and other processed or frozen meats.

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"**Corrugated Boxes** -- Demand for corrugated boxes in meat, poultry and seafood packaging is expected to advance 3.1 percent per year to $2.5 billion in 2011. Box demand will be aided by rising product shipments along with the ongoing need for boxes that are designed with adequate strength and moisture resistance to safeguard products and withstand handling throughout all phases of distribution. The increasing share of case-ready meats in the product mix, along with ..."
--Section IV, pg. 76

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Other Studies

Stretch & Shrink Film

US stretch and shrink film demand will grow 4.7% annually through 2011, driven in part by retail trends favoring shrink-wrapped multipacks and pallet wrap. Stretch and shrink film will grow at a similar pace, with stretch film remaining the larger segment. The dominant resin, LDPE, offers the best growth opportunities. This study analyzes the $3.7 billion US stretch and shrink film industry, with forecasts for 2011 and 2016 by type, market and resin. It also evaluates market share and profiles major players.

#2254 .... 10/2007.................... $4400

Food Containers: Rigid & Flexible

US food container demand will reach $23.5 billion in 2011. Growth trends include heightened demand for more convenient foods and a shift toward value-added packaging. Plastic containers, and bags and pouches will log the fastest growth. Meat and dairy products and frozen specialties will lead gains by market. This study analyzes the 263 billion unit US food container industry, with forecasts given for 2011 and 2016 by product and market. It also evaluates company market share and profiles major players.

#2208 .... 07/2007.................... $4500

Paper Versus Plastic in Packaging

In eighteen selected markets where plastic and paper compete as packaging materials, plastic will increase its market share to 53% by 2010. The fastest gains for plastic will occur in soy and other nondairy beverages and pet food applications, followed by frozen food, fruit beverages, detergents and single-serving milk bottles. This study analyzes the 24 billion pound competitive plastic and paper packaging industry to 2010 and 2015 by product and market. It also details company market share and profiles major players.

#2133 .... 12/2006.................... $4400

High Visibility Packaging: Clamshells, Blisters & Other

US demand for high visibility packaging will grow 5.1% annually through 2010, based in part on advantages in theft and tamper deterrence and product showcasing. Carded blister packs and clamshells present the best opportunities. Food will remain the largest market while the drug and medical product segment will lead gains. This study analyzes the $6.6 billion US high visibility packaging industry to 2010 and 2015 by material, product and market. It also evaluates market share and profiles major players.

#2128 .... 11/2006.................... $4300

Dairy Packaging

US demand for dairy packaging will grow 4.1% annually through 2010. Gains will be driven by trends toward smaller containers and more food eaten or prepared away from home. Best growth is expected in cultured dairy products such as drinkable yogurt and in cream. Pouches and bottles will present the best opportunities by product. This study analyzes the $3.5 billion US dairy packaging industry to 2010 and 2015 by application, product and material. It also details market share and profiles major players.

#2105 .... 10/2006.................... $4400

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