

[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table
& Chart 5](#)

[Sample Profile, Table &
Forecast 6](#)

[Order Form 7](#)

[About Freedonia, Custom
Research, Related Studies,
Corporate Use License 8](#)



Flexible Bulk Packaging

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

Study #2238 | September 2007 | \$4500 | 292 pages

www.freedoniagroup.com



The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
Macroeconomic Outlook	5
Demographic Trends	9
Manufacturing Outlook.....	12
Retail Sales Trends	15
Competitive Bulk Packaging.....	18
Historical Market Trends.....	21
Pricing Trends.....	24
Environmental Issues.....	26
Regulatory Issues.....	29
Foreign Trade	33

MATERIALS

General	37
Plastic.....	40
Polyethylene	41
Polypropylene	45
Other Resins	47
Paper.....	49
Steel.....	52
Textiles	54

PRODUCTS

General	56
Shipping Sacks	59
Plastic Shipping Sacks.....	61
Material Use & Product Types	64
Markets	66
Producers.....	70
Paper Shipping Sacks	71
Material Use & Constructions.....	74
Markets	77
Producers.....	80
Textile Shipping Sacks.....	82
Material Use	83
Markets	85
Producers.....	86
Film Wrap	87
Pallet Wrap.....	88
Markets	93
Producers.....	96
Other Bulk Bundling & Overwrap Film.....	99
Markets	101
Producers.....	103
Strapping.....	104
Steel Strapping	107
Markets	109
Producers.....	111
Plastic Strapping	112
Markets	116
Producers.....	118

Drum, Bin & Box Liners.....	120
Markets	123
Producers	124
Flexible Intermediate Bulk Containers	125
Product Types & Constructions	129
Markets	132
Producers	134
Other Flexible Bulk Packaging	136

MARKETS

General	138
Nondurable Goods	141
Food & Beverages	142
Food & Beverage Industry Outlook	143
Flexible Bulk Packaging Demand	146
Film Wrap	147
Shipping Sacks	148
Other	150
Chemical Products.....	151
Chemical Products Outlook.....	152
Flexible Bulk Packaging Demand	155
Shipping Sacks	157
Drum, Box & Bin Liners.....	157
Film Wrap	158
Other	158
Agricultural & Horticultural Products.....	159
Agricultural & Horticultural	
Industry Outlook	159
Flexible Bulk Packaging Demand	162
Shipping Sacks	164
Other	166
Other Nondurable Goods	167
Paper Products.....	168
Paper Products Outlook.....	169
Flexible Bulk Packaging Demand.....	171
Textile Products	173
Textile Products Outlook	173
Flexible Bulk Packaging Demand.....	175
All Other Nondurable Goods	177
Durable Goods	180
Building Materials.....	181
Construction Outlook	182
Flexible Bulk Packaging Demand	185
Shipping Sacks	187
Strapping	188
Film & FIBCs	188
Metal Products	189
Metal Products Outlook	190
Flexible Bulk Packaging Demand	191
Other Durable Goods	193
Other Markets.....	196

INDUSTRY STRUCTURE

General	199
Industry Composition	200

Market Share	204
Illinois Tool Works	205
Exopack	206
Altivity Packaging.....	207
Berry Plastics.....	207
Sigma Plastics.....	208
Bemis	209
AEP Industries	210
Acquisitions & Divestitures.....	210
Competitive Strategies.....	214
Manufacturing & Development	216
Horizontal & Vertical Integration.....	218
Marketing & Distribution	221
Cooperative Agreements.....	224

COMPANY PROFILES

AEP Industries.....	228
Alcoa Incorporated.....	230
Altivity Packaging	231
Anglo American	233
Atlantis Plastics.....	234
B.A.G. Corporation	235
Bancroft Bag	237
Bemis Company	238
Berry Plastics	241
Bulk Lift International.....	243
Cadillac Products	244
CDF Corporation	245
DuPont (EI) de Nemours.....	247
Exopack Holding	249
Exxon Mobil	251
Formosa Plastics Group	253
Fortifiber Corporation	255
Gibraltar Industries	256
Greif Incorporated.....	257
Hedwin Corporation.....	258
Hood Companies	259
Illinois Tool Works.....	260
Intertape Polymer Group	264
Jumbo Bag	266
Langston Companies.....	267
Mondi Group	268
Pinnacle Films	270
Pliant Corporation.....	271
Poly-America LP.....	272
Polychem Corporation	273
Polytex Fibers.....	274
Samuel Manu-Tech.....	276
Scholle Corporation	278
Sealed Air.....	279
Sekisui Jushi.....	280
Sigma Plastics Group	281
Smurfit-Stone Container	284
Storsack Holding.....	285
Tyco International.....	286
UPM-Kymmene Corporation	287
Other Companies Mentioned in Study	289

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table.....3

MARKET ENVIRONMENT

1 Macroeconomic Indicators8
 2 Population & Households..... 12
 3 Manufacturers' Shipments 15
 4 Retail Sales 18
 5 Flexible Bulk Packaging Market,
 1996-2006 23
 Cht Flexible Bulk Packaging Market,
 1996-2006 23
 6 Flexible Bulk Packaging
 Pricing Trends 26
 7 Foreign Trade in Flexible
 Bulk Packaging 36

MATERIALS

1 Raw Material Use in Flexible
 Bulk Packaging 39
 Cht Raw Material Use in Flexible Bulk
 Packaging, 1996-2016..... 39
 2 Plastic Use in Flexible
 Bulk Packaging 41
 3 Polyethylene Use in Flexible
 Bulk Packaging 44
 Cht Polyethylene Use in Flexible Bulk
 Packaging, 2006..... 45
 4 Polypropylene Use in Flexible
 Bulk Packaging 47
 5 Other Plastic Resin Use in
 Flexible Bulk Packaging 49
 6 Paper Use in Flexible
 Bulk Packaging 51
 7 Steel Use in Flexible
 Bulk Packaging 53
 8 Textile Use in Flexible
 Bulk Packaging 55

PRODUCTS

1 Flexible Bulk Packaging
 Demand by Type..... 58
 Cht Flexible Bulk Packaging
 Demand by Type, 2006 58

2 Shipping Sack Demand by Type..... 60
 Cht Shipping Sack Demand
 by Type, 2006 61
 3 Plastic Shipping Sack
 Supply & Demand 64
 4 Material Use in Plastic
 Shipping Sacks..... 66
 5 Plastic Shipping Sack Markets 70
 6 Paper Shipping Sack
 Supply & Demand 73
 7 Material Use in Paper
 Shipping Sacks..... 77
 8 Paper Shipping Sack Markets 80
 9 Textile Shipping Sack
 Supply & Demand 83
 10 Material Use in Textile
 Shipping Sacks..... 85
 11 Textile Shipping Sack Markets..... 86
 12 Film Wrap Demand by Type 88
 13 Pallet Wrap Demand..... 92
 14 Pallet Wrap Markets 96
 15 Other Bulk Bundling &
 Overwrap Film Demand 101
 16 Other Bulk Bundling &
 Overwrap Film Markets 103
 17 Strapping Demand by Type..... 106
 18 Steel Strapping Demand 109
 19 Steel Strapping Markets..... 111
 20 Plastic Strapping Demand 115
 21 Plastic Strapping Markets 118
 22 Drum, Bin & Liner Demand..... 122
 23 Drum, Bin & Box Liner Markets ... 124
 24 Flexible Intermediate Bulk Container
 Supply & Demand 129
 25 Flexible Intermediate Bulk
 Container Markets..... 134
 26 Other Flexible Bulk
 Packaging Demand 137

MARKETS

1 Flexible Bulk Packaging
 Demand by Market..... 140
 Cht Flexible Bulk Packaging Demand
 by Market, 2006 140
 2 Nondurable Goods Flexible
 Bulk Packaging Markets 142

3 Food & Beverage Shipments..... 146
 4 Food & Beverage Market for
 Flexible Bulk Packaging 147
 5 Chemical Product Shipments 155
 6 Chemical Product Market for
 Flexible Bulk Packaging 156
 7 Agricultural & Horticultural
 Indicators 162
 8 Agricultural & Horticultural Market
 for Flexible Bulk Packaging 164
 9 Other Nondurable Goods Markets
 for Flexible Bulk Packaging 168
 10 Paper Product Shipments 170
 11 Paper Product Market for
 Flexible Bulk Packaging 173
 12 Textile Mill Product Shipments..... 175
 13 Textile Product Market for
 Flexible Bulk Packaging 177
 14 All Other Nondurable Goods Markets
 for Flexible Bulk Packaging 180
 15 Durable Goods Markets for
 Flexible Bulk Packaging 181
 16 Construction Expenditures 185
 17 Building Material Market for
 Flexible Bulk Packaging 186
 18 Metal Product Shipments 191
 19 Metal Product Market for
 Flexible Bulk Packaging 193
 20 Other Durable Goods Market for
 Flexible Bulk Packaging 196
 21 Other Flexible Bulk
 Packaging Markets 198

INDUSTRY STRUCTURE

1 US Flexible Bulk Packaging
 Sales by Company, 2006 202
 Cht US Flexible Bulk Packaging
 Market Share, 2006..... 205
 2 Selected Acquisitions
 & Divestitures..... 212
 3 Selected Cooperative Agreements. 226

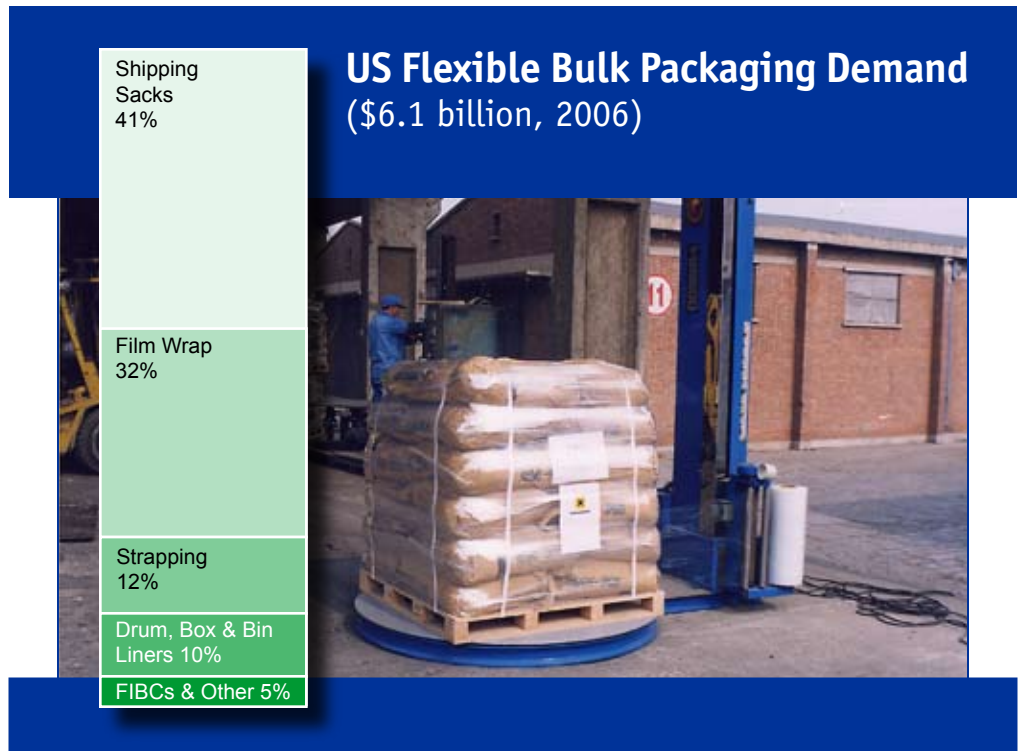
Robust gains in film wrap will be driven by continued bundling and protection of goods during transportation and storage, and by shrink wrapping of retail multipacks and warehouse pallets.

US demand to grow 3.4% annually through 2011

US demand for flexible bulk packaging is expected to increase 3.4 percent per annum to \$7.2 billion in 2011. This will create a market for 5.7 billion pounds of raw materials, of which 63 percent will be plastic, mostly low density polyethylene. Value gains will decelerate from the 2001-2006 period as raw material price increases moderate. However, overall advances will be supported by a healthy outlook for consumer spending and growth in food and beverage production, the top flexible bulk packaging market.

Large film wrap segment to grow the fastest

Film wrap, which accounted for 32 percent of total flexible bulk packaging demand in 2006, will continue to log robust gains, climbing 6.2 percent annually through 2011 to \$2.6 billion. Advances will be driven by continued requirements for the bundling and protection of goods during transportation and storage. In addition, demand will be supported by retail trends, such as the popularity of club stores and other mass market retailers that utilize shrink wrap for multipack items and pallet wrap for product warehousing. Although shipping sacks will see overall slow growth, plastic shipping sack demand will increase at an above-average pace as plastic sacks continue to take market share away from paper and textile alternatives primarily due to their lower



cost. As a result, by 2011, plastic will gain over half of the shipping sack market. Similarly, despite overall modest strapping gains through 2011, plastic strapping will register above-average growth as further inroads are made into markets, such as building materials, once dominated by steel strapping. Drum, bin and box liners will see healthy gains, driven by their protection properties and their ability to facilitate the reuse of rigid containers and flexible intermediate bulk containers.

Nondurable goods market to remain dominant

Nondurable goods markets represented over 70 percent of demand in 2006 and

will advance above the industry average through 2011. Growth in food and beverages, the largest single flexible bulk packaging market, will be stimulated by a healthy production outlook. Gains in the paper and textile markets will be helped by the expansion of paper production and a relative stabilization of textile mill output after years of declines. Slower gains in chemical, and agricultural and horticultural product markets will result from the maturity of both sectors and continued inroads of lower cost plastic sacks at the expense of higher-priced paper sacks. Durable goods uses will benefit from an acceleration in shipments of certain products, such as automobiles, automotive parts and electronic products.

**Sample Text,
 Table & Chart**

PRODUCTS

Shipping Sacks

Demand for shipping sacks is projected to rise to \$1.5 billion by 2016, a unit advance of less than 1 percent from 2006. Plastic sacks will continue to dominate the market, with material enhancements and improved manufacturing processes for plastic sacks. Paper and other materials are being used as firms increasingly seek to reduce costs by performing plastic alternatives.

**SAMPLE
 TEXT**

Overall, competition from flexible intermediate bulk containers (FIBCs) and various rigid bulk packaging types, such as material handling containers and drums, will constrain growth for shipping sacks as these alternatives can be more efficiently handled, filled, shipped and warehoused than larger numbers of individual sacks and bags. Prospects for smaller-sized shipping sacks, especially paper types, will also be negatively impacted to some degree by competition from stand-up pouches, particularly for products such as plant food and pet food sold in consumer retail outlets. Since 2001, plastic shipping sacks, because of cost advantages and resin improvements which have increased their durability, have slightly pulled ahead of paper shipping sacks in unit terms, becoming the dominant shipping sack material.

Shipping sacks, which accounted for 41 percent of flexible bulk packaging demand in 2006, will continue to lose ground in the overall flexible bulk packaging market, in part due to changes in storage and shipping that favor the use of rigid containers in some cases. Reusable drums, material handling containers and rigid intermediate bulk containers (RIBCs) can reduce total packaging costs in the long term, especially in a closed-loop system. RIBCs will experience healthy growth because of lower overall costs to the user, specifically lower labor and handling expenditures.

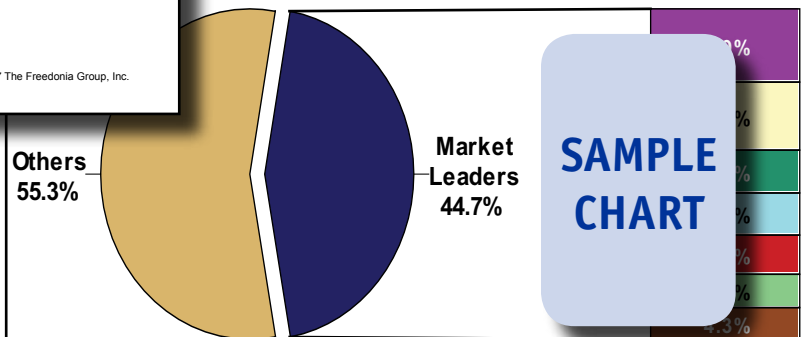
**TABLE IV-8
 PAPER SHIPPING SACK MARKETS
 (million dollars)**

Item	1996	2001	2006	2011	2016
Paper Shipping Sack Demand					
Nondurable Goods:					
Food					
Ag & Horticultural Products					
Chemical Products					
Other Nondurable Goods					
Durable Goods:					
Building Materials					
Metal Products					
Other Durable Goods					
Other Markets					

**SAMPLE
 TABLE**

CHART VI-1

**FLEXIBLE BULK PACKAGING MARKET SHARE, 2006
 (\$6.1 billion)**



**SAMPLE
 CHART**

**Sample Profile,
 Table & Forecast**

COMPANY PROFILES

Langston Companies Incorporated

1760 South Third Street
 Memphis, TN 38109
 901-774-4440
 http://www.lan

Annual Sales:
 Employment:

Key Products:
 ing and flexibl

**SAMPLE
 PROFILE**

Langston Companies converts paper and woven textiles into sacks, bags, wrappings, containers and covers. The privately held company operates in three main divisions: Multiwall, Textile and Bulk Bag.

The Company is active in the US flexible bulk packaging industry through all three divisions. The Multiwall division, which conducts manufacturing activities at its West Memphis, Arkansas headquarters facility, produces multiwall paper bags made from one to six plies of regular and high-strength, high-performance kraft papers. These bags are offered in such styles as sewn open-mouth, pasted-valve stepped-end, pasted open-mouth, pasted bottom open-mouth and self-opening types.

Langston's Textile division (Memphis, Tennessee) manufactures POLYWEVE textile bags from such materials as burlap, cotton and woven polypropylene fabrics. In general, these bags, which are available in sizes ranging from 10 to 140 pounds, can be utilized to package grain, beans and other dry flowable foodstuffs. In addition, the division produces COTTON-TAINERS textile bags for overwrapping cotton bales. In the US, textile bags are primarily made at a site in Memphis,

TABLE V-4

**FOOD & BEVERAGE MARKET FOR
 FLEXIBLE BULK PACKAGING
 (million dollars)**

Item	1996	2001	2006	2011	2016
Food & Beverage Shpts (bil \$)	444	511	578	645	712
\$ pkg/000\$ food & beverage	2	2	2	2	2
Food & Beverage Flex Bulk Pkg					10
Film Wrap:					16
Pallet Wrap					28
Other Bundling & Overwrap					38
Shipping Sacks:					74
Paper Shipping Sacks					53
Textile Shipping Sacks					35
Plastic Shipping Sacks					36
Drum, Bin & Box Liners					26
FIBCs					49
Strapping					45
% food & beverage	2	2	2	2	7
Flexible Bulk Packaging Demand	420	474	538	602	660

**SAMPLE
 TABLE**

"Film wrap demand will fare the best of all flexible bulk packaging types in the food and beverage market, climbing 5.8 percent per year to \$996 million in 2011. Robust gains will be based on rising food and beverage production and continued extensive usage of pallet wrap for the shipping, handling and protection of a wide array of foods for distribution to grocery stores, club stores and other mass retailers. An acceleration in sales generated by ..."

--Section V, pg. 147

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

Rigid Bulk Packaging

US demand for rigid bulk packaging will reach \$6.6 billion in 2011, aided by growth in manufacturing and a shift toward larger, higher-value containers. Rigid intermediate bulk containers (RIBCs) will log the fastest gains, followed by material handling containers. Despite their maturity, drums will remain a mainstay in industry. This study analyzes the US rigid bulk packaging industry to 2011 and 2016 by material, product and market. It also evaluates company market share and profiles leading competitors.

#2188..... 05/2007..... \$4500

Meat, Poultry & Seafood Packaging

US demand for meat, poultry and seafood packaging will grow 4.2% annually through 2011. Smaller, more convenient packaging sizes and an increasing variety of items that are further processed will provide opportunities. Flexible packaging such as pouches and high barrier film will outpace rigid types. This study analyzes the \$6.6 billion US meat, poultry and seafood packaging industry to 2011 and 2016 by material, product, application and market. It also details market share and profiles major players.

#2176..... 03/2007..... \$4400

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

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

[Click here to learn more about Freedonia](#)

Freedonia Custom Research

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

[Click here to learn more about Custom Research](#)



[Click here for complete title list](#)



[Click here to visit freedoniagroup.com](http://www.freedoniagroup.com)