

[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](#)

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Frozen Food Packaging

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

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
Demographic Trends	5
Macroeconomic Outlook	9
Consumer Spending Outlook.....	13
Retail Sales Outlook	16
Food Industry Outlook	20
Frozen Food Industry Outlook	22
Foodservice Industry Outlook.....	25
Packaging Industry Outlook	27
Pricing Trends	31
Environmental & Regulatory Issues	33

APPLICATIONS

General	36
Meat, Poultry & Seafood.....	39
Frozen Meat, Poultry & Seafood Outlook	39
Packaging Demand	41
Poultry	44
Meat	48
Seafood	51
Frozen Specialties	55
Frozen Specialties Outlook.....	56
Packaging Demand	58
Entrees & Dinners.....	61
Pizza	64
Other Specialties.....	66
Fruit & Vegetables.....	70
Frozen Fruit & Vegetable Outlook.....	71
Packaging Demand	73
Vegetables	74
Fruit & Juice	79
Ice Cream	83
Ice Cream Outlook.....	84
Packaging Demand	85
Baked Goods	91
Frozen Baked Goods Outlook	91
Packaging Demand	93
Other	97

PACKAGING PRODUCTS

General	101
Boxes.....	104
Folding Cartons.....	108
Corrugated	110
Sleeves.....	112
Bags	113
Tubs & Cups	118
Trays.....	121
Wrap	125
Pouches.....	129
Other	135
Plastic Containers	136
Aluminum Foil Containers.....	138
Gabletop Cartons	139
All Other.....	140
Materials & Formats.....	141

INDUSTRY STRUCTURE

General	146
Market Share	149
Huhtamaki	151
Rock-Tenn.....	152
Bemis.....	152
Graphic Packaging	152
Altivity Packaging	153
Smurfit-Stone Container	154
Printpack.....	154
Sealed Air	155
Rio Tinto Group	155
Weyerhaeuser	156
Acquisitions & Divestitures.....	157
Competitive Strategies.....	162
Marketing & Distribution	165
Cooperative Agreements.....	167

COMPANY PROFILES

AEP Industries.....	170
Alcoa Incorporated.....	172
Altivity Packaging	174
American Packaging	176

Ampac Packaging	178
Anchor Packaging	179
Associated Packaging Technologies	181
Bemis Company	182
Berry Plastics Group	185
Caraustar Industries	187
Carter Holt Harvey.....	189
CM Packaging	191
Excelsior Packaging	193
Exopack Holding	194
Gage Industries	196
Graphic Packaging.....	197
Healthy FX International	200
Hindalco Industries	201
Hood Companies	203
Huhtamaki Oyj.....	204
International Paper	206
Koch Industries	208
LINPAC Group	210
MeadWestvaco Corporation	212
Menasha Corporation	214
Mullinix Packages.....	215
Pactiv Corporation.....	216
Pliant Corporation	219
Printpack Incorporated	221
Rio Tinto Group	223
Rock-Tenn Company	225
Sealed Air.....	228
Smurfit-Stone Container	230
Solo Cup.....	232
Sonoco Products	235
Weyerhaeuser Company	236
Wilkinson Industries	239

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table.....3

MARKET ENVIRONMENT

1 Population & Households.....8
2 Macroeconomic Indicators 13
3 Consumer Income & Spending 16
4 Retail Sales 19
5 Food Shipments 21
6 Frozen Food Shipments 24
Cht Frozen Food Shipments
by Type, 2006 25
7 Foodservice Revenues by
Establishment Type..... 27
8 Packaging Supply & Demand 30
9 Selected Frozen Food
Packaging Prices 33

APPLICATIONS

1 Frozen Food Packaging Demand
by Application 38
Cht Frozen Food Packaging Demand
by Application, 2006 38
2 Frozen Meat, Poultry &
Seafood Shipments 41
3 Frozen Meat, Poultry & Seafood
Packaging Demand 43
Cht Frozen Meat, Poultry & Seafood
Packaging Demand
by Product, 2006..... 43
4 Frozen Poultry Packaging
Demand by Type..... 47
Cht Frozen Poultry Packaging
Demand by Type, 2006 48
5 Frozen Meat Packaging
Demand by Type..... 50
Cht Frozen Meat Packaging
Demand by Type, 2006 51
6 Frozen Seafood Packaging
Demand by Type..... 54
Cht Frozen Seafood Packaging
Demand by Type, 2006 55
7 Frozen Specialties Shipments 58

8 Frozen Specialties
Packaging Demand 60
Cht Frozen Specialties Packaging
Demand by Product, 2006 60
9 Frozen Entree & Dinner Packaging
Demand by Type..... 63
Cht Frozen Entree & Dinner Packaging
Demand by Type, 2006 64
10 Frozen Pizza Packaging
Demand by Type..... 66
11 Other Frozen Specialties Packaging
Demand by Type..... 69
Cht Other Frozen Specialties Packaging
Demand by Type, 2006 70
12 Frozen Fruit & Vegetable
Shipments..... 73
13 Frozen Fruit & Vegetable
Packaging Demand 74
14 Frozen Vegetable Packaging Demand
by Product & Type 78
Cht Frozen Vegetable Packaging
Demand by Type, 2006 79
15 Frozen Fruit & Juice Packaging
Demand by Product & Type 82
Cht Frozen Fruit & Juice Packaging
Demand by Type, 2006 83
16 Ice Cream & Other Frozen
Dessert Shipments..... 85
17 Ice Cream & Other Frozen Dessert
Packaging Demand
by Product & Type 90
Cht Ice Cream & Other Frozen Dessert
Packaging Demand
by Type, 2006 91
18 Frozen Baked Goods Shipments 93
19 Frozen Baked Goods Packaging
Demand by Type..... 96
Cht Frozen Baked Goods Packaging
Demand by Type, 2006 97
20 Other Frozen Food Packaging
Demand by Type..... 100

PACKAGING PRODUCTS

1 Frozen Food Packaging
Demand by Type..... 103
Cht Frozen Food Packaging
Demand by Type, 2006 104
2 Box Demand in Frozen Food
Packaging by Type
& Application 107
Cht Box Demand in Frozen Food
Packaging by Application, 2006 108
3 Bag Demand in Frozen Food
Packaging by Type
& Application 117
Cht Bag Demand in Frozen Food
Packaging by Application, 2006 118
4 Tub & Cup Demand in Frozen Food
Packaging by Type
& Application 121
5 Tray Demand in Frozen Food
Packaging by Type
& Application 125
6 Wrap Demand in Frozen
Food Packaging..... 129
7 Pouch Demand in Frozen
Food Packaging..... 134
8 Other Frozen Food Packaging
Demand by Type
& Application 136
9 Frozen Food Packaging
by Material & Format 144
Cht Frozen Food Packaging Demand
by Material, 1996-2016 145

INDUSTRY STRUCTURE

1 US Frozen Food Packaging
Sales by Company, 2006 148
Cht US Frozen Food Packaging
Market Share, 2006..... 151
2 Selected Acquisitions
& Divestitures..... 160
3 Selected Cooperative Agreements. 168

Gains in frozen food packaging will be driven by heightened demand for convenience-type foods, along with the prevalence of microwave ovens and technological advances in packaging.

US demand to grow 4.1% annually through 2011

Demand for frozen food packaging is projected to increase 4.1 percent per year to \$6.4 billion in 2011. Gains will be driven by heightened demand for convenience-type foods, along with the prevalence of microwave ovens and technological advances in packaging. Demographic trends such as smaller household sizes, the aging of the population and rising numbers of households where all adults work will have a positive impact on consumption of convenience-type foods, which tend to use more packaging relative to their volume. In addition, healthy revenue growth in the foodservice industry, which relies heavily on frozen foods, will boost opportunities for packaging. Additional factors supporting advances include product development activity in the frozen food industry that incorporates value-added packaging, along with increased varieties of ethnic and organic frozen foods, and broader offerings of products in portion control sizes.

Meat, frozen specialties markets to lead gains

Meat, poultry and seafood and frozen specialties applications, which together accounted for nearly 60 percent of demand in 2006, will post above-average growth through 2011. Gains in meat, poultry and seafood uses will be the result of production volume expansion and rising demand for convenience-type items, especially microwaveable

US Frozen Food Packaging Demand (\$6.4 billion, 2011)



products and those packaged for single-portion use. A solid outlook for the foodservice industry, especially quick service restaurants, will drive opportunities for related packaging as these restaurants rely heavily on frozen hamburgers, chicken and seafood. Packaging growth in frozen specialties uses (e.g., entrees and dinners, pizza, breakfast products, appetizers, etc.) will be driven by favorable demographics and the convenience and improved quality of many frozen specialties products. Ongoing new product introductions of organic and other more healthful products and products using premium ingredients will add momentum for frozen specialties as well as related packaging.

Fruit and vegetable, ice cream and baked goods applications will expand more slowly. Nonetheless, growth opportunities will exist for various packaging types. For instance, the mature frozen vegetable market has been reinvigorated by a spate of new products that use self-venting films to enable steam cooking directly in pouches. Solid gains for pouches in frozen baked goods applications will be based on resealable pouches targeted at smaller households. Other frozen food applications, such as soup, sauces, whipped topping, pet food and baby food, will log above-average gains from a smaller base, the result of ongoing product development activity.

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Sample Text, Table & Chart

APPLICATIONS

Poultry - Demand for frozen poultry packaging is forecast to advance 5.0 percent annually through 2016. Gains are supported by continued growth in the foodservice industry, demand for lower cost and a more favorable nutritional profile in terms of fat and cholesterol, and the convenience of frozen poultry products. Demand for quick service chicken parts and other processed poultry products, such as frozen stuffed chicken breasts, is also strong. The popularity of poultry-based product introductions of frozen products, giving a boost to packaging demand. In addition, healthy growth in the foodservice industry, increasing share of poultry-based menu items will bode well for demand. Moreover, frozen poultry packaging advances will be driven by the widespread reliance on frozen poultry in restaurants, and quick service types.

SAMPLE TEXT

Boxes, bags and wrap are the leading packaging formats with frozen poultry, representing a combined 86 percent of demand in 2011. Bags will experience above-average growth based on heightened demand for convenience-type poultry products that use bag packaging, such as IQF parts, breaded chicken tenders and seasoned wings. Demand will also be aided by the increased presence of frozen poultry in larger bags, both in supermarkets and club stores. In addition, shrink bags are widely used with whole frozen turkey and chicken. Factors such as resealability and reduced packaging material volume versus folding cartons will support gains for bags and pouches. Good opportunities for bags will also be found in frozen whole bird packaging, with specialty bags that can go from freezer to oven meeting consumer demand for convenience. For instance, Hormel's JENNIE-O TURKEY STORE oven-ready frozen turkeys are packaged in carrier bags that hold an inner cook-in bag. This product does not require defrosting and the inner bag eliminates the need to handle raw poultry. The packaging is supplied by Bemis' Curwood

TABLE III-9

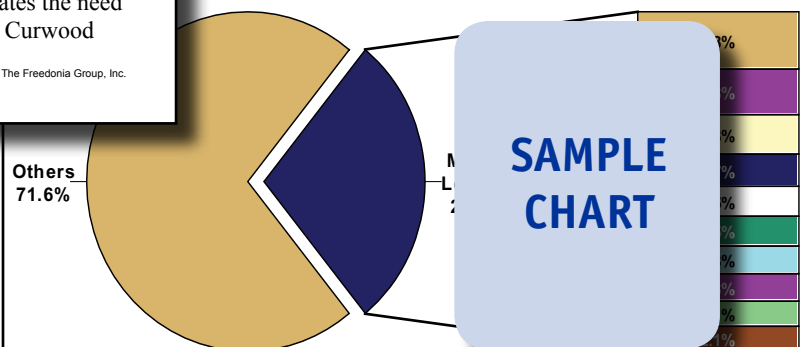
FROZEN ENTREE & DINNER PACKAGING DEMAND BY TYPE (million dollars)

Item	1996	2001	2006	2011	2016
Frozen Entree & Dinner Shpts (bil \$)	5.1	6.5	7.9	9.5	11.3
\$ pkg/000\$ entree & dinner shpts					
Frozen Entree & Dinner Packaging Boxes:					
Folding Cartons					
Corrugated					
Sleeves					
Trays:					
Plastic					
Paper					
Bags & Pouches					
Aluminum Foil Containers					
Other					
% entree & dinner					
Frozen Specialties Packaging Demand	915	1115	1455	1780	2200

SAMPLE TABLE

CHART V-1

FROZEN FOOD PACKAGING MARKET SHARE, 2006 (\$5.2 billion)

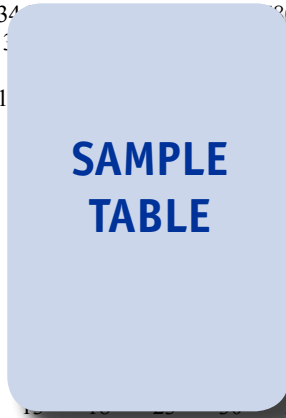


SAMPLE CHART

Sample Profile, Table & Forecast

TABLE IV-2
BOX DEMAND IN FROZEN FOOD PACKAGING
BY TYPE & APPLICATION
 (million dollars)

Item	1996	2001	2006	2011	2016
Total Frozen Food Packaging Demand	34	42	50	52	55
% boxes	2	2	2	2	2
Frozen Food Box Demand	1	1	1	1	1
By Type:					
Folding Cartons				06	
Corrugated Boxes				59	
Sleeves				35	
By Application:					
Meat, Poultry & Seafood				78	
Frozen Specialties				94	
Baked Goods				97	
Ice Cream				71	
Fruit & Vegetables				24	
Other				36	



COMPANY PROFILES

Exopack Holding Corporation
 3070 Southport Road
 Spartanburg, SC 29302
 864-596-7140
 http://www...

Annual Sales (SEC)
 US Sales (SEC)
 Employee

SAMPLE PROFILE

Key Products: microwaveable packaging, high barrier products, rollstock, overwraps, shrink films and laminations

Exopack Holding makes paper and plastic flexible packaging for the food, lawn and garden, agricultural, pet food, and construction industries. The Company operates through two segments: Paper Packaging and Plastic Packaging. Exopack Holding is owned by Sun Capital Partners Incorporated (Boca Raton, Florida), a private equity firm.

The Company is active in the US frozen food packaging industry through the Plastic Packaging segment, which accounted for sales of \$319 million in 2006. The segment manufactures plastic packaging for such items as frozen and other foods, beverages, paper towels and tissues, health care products, and other consumer goods. This segment includes the activities of Exopack Holding's two major operating subsidiaries: Exopack LLC (Spartanburg, South Carolina) and Cello-Foil Holding Corporation (Battle Creek, Michigan). Among other products, these companies produce films, stand-up pouches, bags, microwaveable packaging, high barrier products, rollstock, overwraps, shrink films and laminations under the EXOPACK and CELLO-FOIL brand names. The

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"Frozen fruit and vegetable applications for boxes are forecast to advance 1.9 percent annually to \$110 million in 2011, the slowest among major frozen food markets. Boxes, especially folding cartons, will face further inroads by bags and pouches, which offer advantages in terms of reclosability and better protection against freezer burn. Box opportunities will also be constrained by ..."

--Section IV, pg. 107

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OTHER STUDIES

Corrugated & Paperboard Boxes

The US corrugated and paperboard box industry is analyzed in this study. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by board material (e.g., unbleached kraft, recycled, semichemical, bleached kraft); product (e.g., corrugated, solid fiber, folding, set-up); and market (e.g., food and beverages, nonfood nondurables, durables, nonmanufacturing). The study also considers market environment factors, evaluates company market share and profiles major box manufacturers.
 #2312 02/2008..... \$4500

Converted Flexible Packaging

US converted flexible packaging demand will grow 4.2% annually through 2011. Gains will be driven in part by advantages over most rigid packaging and by developments in breathable and self-venting films and resealable features. Pouches will be the fastest growing type while bags remain the largest segment. This study analyzes the \$13.4 billion US converted flexible packaging industry, with forecasts for 2011 and 2016 by material, product and market. It also evaluates market share and profiles major players.
 #2275 11/2007..... \$4600

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

Active & Intelligent Packaging

US demand for active and intelligent packaging will grow 13% yearly through 2011. Intelligent packaging will grow the fastest, driven by the emergence of lower cost time-temperature indicator (TTI) labels. Active packaging will be paced by gas scavengers. Pharmaceuticals, beverages and food will offer the best market prospects. This study analyzes the US active and intelligent packaging industry, with forecasts for 2011 and 2016 by product and market. It also details market share and profiles major players.
 #2236 08/2007..... \$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

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