Corrugated & Paperboard Boxes

US Industry Study with Forecasts for **2012 & 2017**

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US Industry Study with Forecasts for *2012 & 2017*

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Table of Contents

(continued on next page)

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US Industry Study with Forecasts for ***2012 & 2017***

Table of Contents

COMPANY PROFILES

(continued from previous page)

List of Tables/Charts

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

MATERIALS

PRODUCTS

MARKETS

INDUSTRY STRUCTURE

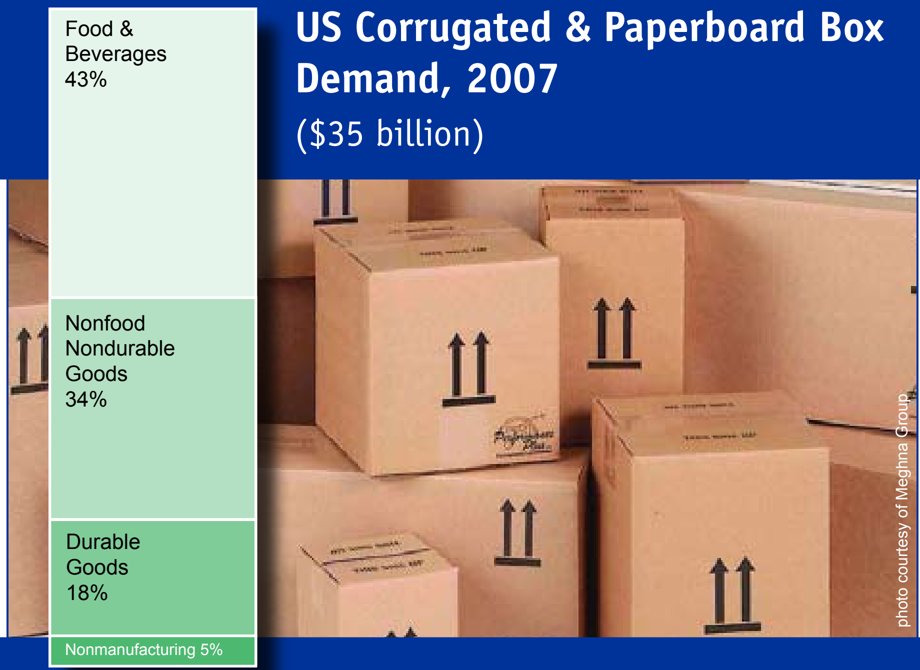
Corrugated & Paperboard Boxes

US Industry Study with Forecasts for ***2012 & 2017***

Advances will be bolstered by higher-value boxes offering improved printing and graphics capabilities for producers seeking to boost box aesthetics to compete with other packaging.

US box demand to reach nearly $40 billion in 2012

Demand for corrugated and paperboard boxes is expected to rise 2.5 percent annually through 2012 to $39.9 billion, with gains driven by an increase in the production of both nondurable and durable goods. In addition, advances will be bolstered by the increasing importance of higher-value boxes offering improved printing and graphics capabilities as producers seek ways to boost the aesthetic appeal of boxes in the face of competition from alternative packaging. The continued popularity of Internet shopping will drive demand for shipping boxes. While boxes with more sophisticated graphics are typically more prevalent in the folding carton segment, the popularity of mass retailers and warehouse club stores have also prompted corrugated box makers to develop more attractive products.



US Corrugated & Paperboard Box Demand, 2007
($35 billion)

Corrugated, solid fiber boxes to remain dominant

Sales of corrugated and solid fiber boxes, which accounted for more than 70 percent of demand in 2007, will increase 2.7 percent annually through 2012 to $28.8 billion. Growth will be based on their well-entrenched position as low-cost shipping containers in virtually all manufacturing sectors. Demand will also be supported by the good environmental profile of corrugated boxes, which will become increasingly advantageous as interest in sustainable packaging continues to rise. In addition, value gains will be supported by rising demand for boxes utilizing more expensive white top linerboard grades that can accommodate high-quality printing.

Folding paperboard box demand will increase 1.7 percent annually through 2012 to $10.5 billion, slower than corrugated box growth as folding cartons face heightened competition in many markets from alternative packaging such as pouches, clamshells and blister packs. Nevertheless, folding carton sales will be supported by advances in printing and paperboard graphics capabilities and a better environmental image than plastic packaging. Demand for set-up boxes will primarily be driven by their extensive use in high-end confectionery, and silverware and jewelry applications.

Nondurables offer good market opportunities

Food and beverages will remain the largest market for boxes through 2012. Favorable growth will be registered in beverages, meat products, fresh produce and frozen foods. Other nondurable goods markets offering good prospects for boxes include pharmaceuticals, cosmetics and toiletries, and rubber and plastic products. In durable goods markets, the best prospects will be in medical and other instruments, and entertainment and software products. Faster box growth in nonmanufacturing markets will be supported by the continued expansion of Internet shipping and carry-out foodservice.

Corrugated & Paperboard Boxes

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Sample Text, Table & Chart

TABLE IV-5

CORRUGATED & SOLID FIBER BOX DEMAND BY MARKET (million dollars)

Item	1997	2002	2007	2012	2017
Manufacturers' Shipments (bil $)	3				025
$ boxes/000$ shpts					43
Corrugated/Solid Fiber Box Demand	1				00
Nondurables:	1				40
Food & Beverages					50
Paper & Publishing					55
Chemical & Pharmaceutical					30
Other Nondurables					55
Durables					25
Nonmanufacturing					35

SAMPLE TABLE

MATERIALS

Folding Paperboard Boxes

Consumption of paperboard in folding paperboard bo
pected to rise ... million tons in 20
board was the ... folding paperbo
2007, with 36 ... llowed by bleach
33 percent an ... remainder. Thro
unbleached k ... astest growth, wi
board also inc ... rate. In general
consumption i ... fit from healthy g
shipments of beverages, pharmaceuticals, cosmetics and t ... and
in carry-out food containers. Competition from flexible packaging alternatives such as bags and pouches will limit folding carton gains and associated paperboard consumption. Additionally, increasing usage of mini-flute corrugated boxes in many markets will hinder gains, as will the elimination of cartons as part of source reduction initiatives.

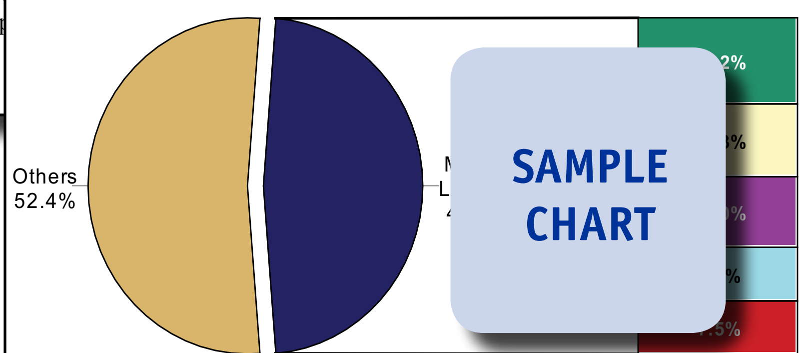
SAMPLE TEXT

Recycled board consumption in folding paperboard boxes is forecast to decline to under 2.3 million tons, continuing a long-term trend. In contrast to corrugated containerboard, where recycled board experienced substantial growth in the 1990s, recycled paperboard in folding cartons has generally seen an erosion in market share since 1997. This has largely been due to heightened usage of unbleached kraft board, particularly CUK, which offers better strength and printability than recycled board for more demanding consumer applications. In addition, demand for recycled board will be constrained by expected high energy prices, since the production of recycled board employs a more energ
process than other types of paperboard.

One of the most widely used recycled paperboard grade
cartons is clay-coated newsback, which can be utilized in a r
applications from dry foods to toiletries. Among the produc
coated recycled boxboard is Rock-Tenn, which makes such p

CHART VI-1

US CORRUGATED & PAPERBOARD BOX MARKET SHARE, 2007 ($35.3 billion)



SAMPLE CHART

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Sample Profile, Table & Forecast

TABLE V-19

CHEMICAL & PHARMACEUTICAL BOX DEMAND BY MARKET & TYPE (million dollars)

Item	1997	2002	2007	2012	2017
Chemical & Pharma Shpts (bil $)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
$ boxes/000$ chemicals	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Chemical & Pharma Box Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Market:					
Pharmaceuticals	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Cosmetics & Toiletries	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Cleaning Chemicals	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other Chemicals	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Type:					
Corrugated & Solid Fiber Boxes	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Folding Paperboard Boxes	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Set-Up Paperboard Boxes	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% chemical	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Nonfood Nondurables Box Markets	9976	11095	11960	13280	14670

SAMPLE TABLE

COMPANY PROFILES

Altivity Packaging LLC
450 East North Avenue
Carol Stream, IL 60188
630-260-6500
http://www.altiv[illegible]

Annual Sales: $[illegible]
Employment: [illegible]

Key Products: [illegible]

SAMPLE PROFILE

Altivity Pa[illegible]dustrial packaging, including [illegible] folding cartons, labels and other types of flexible packaging. The Company was formed in June 2006 when Texas Pacific Group (Fort Worth, Texas), a private equity firm, acquired the $1.7 billion Consumer Packaging segment of Smurfit-Stone Container Corporation (Chicago, Illinois) for $1 billion. In July 2007, Altivity Packaging agreed to be acquired by Graphic Packaging Corporation (Marietta, Georgia), a $2.4 billion producer of paperboard packaging, containerboard and other packaging products. The transaction is expected to be completed in sometime in 2008.

The Company is active in the US corrugated and paperboard box industry through the manufacture of folding cartons for such markets as food, cosmetics, electronics, pet food, pharmaceuticals, personal care products, medical devices and paper goods. These cartons, which are made from 100-percent recycled boxboard, are suitable for micro-embossing; flexographic, rotogravure and lithographic printing; and windowing. Among Altivity Packaging's specific folding cartons are LITHOFLUTE corrugated cartons, which feature B, E and F mini-flute

235

"Demand for boxes in the pharmaceuticals market is expected to grow 4.2 percent annually through 2012 to $1.1 billion, driven by a healthy outlook for pharmaceutical shipments. Growth in demand for pharmaceuticals (and related boxes) will be bolstered by an aging population that consumes increasing quantities of medication, the rising incidence of acute and chronic medical conditions requiring drug therapy, and a trend toward self-medication as a means to hold down health care costs."
--Section V, pg. 159

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Other Studies

Cosmetic & Toiletry Containers

The US market for cosmetic and toiletry containers is analyzed in this study. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by product (e.g., plastic bottles and tubes, folding cartons, set-up boxes, glass bottles and jars, metal cans and bottles, metal tubes); and market (e.g., hair care, skin care, oral care, cosmetics, fragrances, deodorants and antiperspirants). The study also considers market environment factors, details company market share and profiles leading industry players.

#2322 .... 04/2008..................... $4600

Frozen Food Packaging

US demand for frozen food packaging will grow 4.1% annually through 2011. Gains will be driven by heightened demand for convenience-type foods, along with the prevalence of microwave ovens. Meat, poultry and seafood and frozen specialties applications will remain dominant and post above-average growth. This study analyzes the $5.2 billion US frozen food packaging industry, with forecasts for 2011 and 2016 by application and product. It also evaluates company market share and profiles leading competitors.

#2304 .... 02/2008..................... $4500

Foodservice Disposables

Foodservice disposables demand in the US will grow 3.8% annually through 2011 as more food is eaten or prepared away from home. Packaging will lead gains and surpass serviceware as the largest category by 2011. The eating and drinking places market will remain dominant while the retail and vending segment grows the fastest. This study analyzes the $13.7 billion US foodservice disposables industry, with forecasts for 2011 and 2016 by type and market. It also details market share and profiles major players.

#2256 .... 10/2007..................... $4400

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

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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