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Protective Packaging

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

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Table of Contents

(continued on next page)

Protective Packaging

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

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Table of Contents

COMPANY PROFILES

(continued from previous page)

List of Tables/Charts

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

OVERVIEW

FOAMED PLASTIC

OTHER PROTECTIVE PACKAGING

INDUSTRY STRUCTURE

Fastest advances are anticipated for air pillows, insulated shipping containers, protective mailers and bubble packaging based on their significant usage in e-commerce shipping.

US demand to grow 4.6% annually through 2012

Protective packaging demand is projected to expand 4.6 percent per year to $5.2 billion in 2012, driven by manufacturing growth and the proliferation of Internet commerce. These factors will fuel demand for cost-effective packaging used in the protection of goods from shock, vibration, abrasion and other damaging effects of shipping and handling. Fastest advances are anticipated for products that have significant usage in the shipping of goods purchased via Internet sales channels.

Air pillows, insulated containers, bubble wrap to be fastest growing types

Demand for air pillows is expected to climb nearly ten percent annually to $440 million in 2012, driven by advantages of versatility and excellent performance with light- to medium-weight items, along with consumer preference for the product over other materials such as loose-fill. Insulated shipping container demand will be fueled primarily by the increased presence of temperature-sensitive drugs as temperature control throughout the supply chain is critical to the efficacy of these drugs. Also driving growth will be expanded specialized delivery requirements resulting from increased online sales of perishable foods. Good opportunities for bubble packaging will reflect the growing popularity of onsite bubble packaging systems, which are gaining ground as they offer greater cost-effectiveness and reduced warehouse space compared to standard bubble materials. Protective mailer advances will be driven by the need for economical, lightweight, preconstructed protective packaging for the shipping of a wide variety of relatively small objects.

Foamed plastic protective packaging demand is forecast to increase 3.5 percent per year to $1.2 billion in 2012, aided by advantages of light weight and excellent cushioning capabilities compared to paperboard and other materials. Gains will lag the overall protective packaging market as resin prices rise more slowly and manufacturing is outsourced to nations that offer lower-cost production. Polyolefin roll (i.e., polyethylene and polypropylene) product demand will outpace the foam average based on versatility and cost-effectiveness in the protection of furniture, electronics and other products from scratches and abrasion. Demand for molded foam, especially expanded polystyrene, will be stimulated by heightened usage as components of multimaterial packaging systems designed to reduce packaging waste by eliminating the need for outer corrugated boxes. Growth for foamed-in-place polyurethane will be supported by its superior cushioning properties and ability to provide packaging that conforms to items of virtually any shape.

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Sample Text, Table & Chart

TABLE IV-2

MOLDED FOAM PROTECTIVE PACKAGING DEMAND
(million dollars)

Item	1997	2002	2007	2012	2017
Durable Goods Shipments (bil $)					
$ molded foam/mil $ shpts					
Molded Foam Protective Packaging					
Expanded Polystyrene					
Polyolefins					
Polyurethane					
% molded					
Plastic Foam Protective Pkg					

SAMPLE TABLE

OTHER PROTECTIVE PACKAGING

Degradable Plastic Loose-Fill

Demand for degradable plastic loose-fill packaging is pr
increase ... 5 million in 2012. A
will be c ... blend polymers wi
perform ... as a result of proc
proveme ... en packaging, whi
to increa ... ill. At the same ti
will be r ... pillows, bubble pa
and paper

SAMPLE TEXT

Starch-derived loose-fill packaging, typically from corn or wheat, has a number of advantages including biodegradability and water solubility. The material is also relatively easy to dispose of and, if not reused, can be added to compost heaps. In addition, its low-static properties make it appropriate for shipping microchips and electronic products susceptible to damage from static electricity. However, despite substantial gains over the last decade, starch- based loose-fill will continue to face competition from kraft paper, foamed-in-place polyurethane packaging and expanded polystyrene loose-fill. Degradable loose-fill is more dense than EPS loose-fill, making similar cubic foot-sized bags of degradable loose-fill heavier than bags of EPS loose-fill.

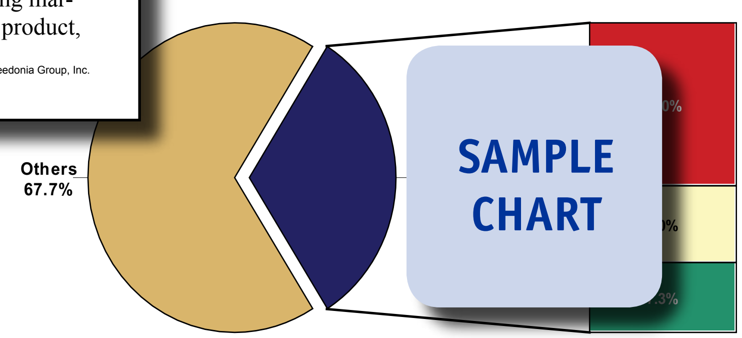
Degradable loose-fill is produced primarily by firms involved in the EPS loose-fill market. Storopack is the leading supplier of degradable loose-fill packaging. The firm's PELASPAN BIO loose-fill is 100-percent biodegradable and water soluble. PELASPAN BIO is made using a mixture of corn and potato starch, and features Storopack's proprietary "S" design, which enables the pieces to interlock for enhanced stability.

Other producers of degradable loose-fill packaging include Free-Flow Packaging International and Pak-Lite. Free-Flow Packaging markets its degradable loose-fill under the BIO 8 brand name. This product,

127

CHART VI-1

...OTECTIVE PACKAGING MARKET SHARE, 2007
($4.1 billion)



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Sample Profile, Table & Forecast

TABLE V-1

OTHER PROTECTIVE PACKAGING DEMAND BY TYPE
(million dollars)

Item	1997	2002	2007	2012	2017
Gross Domestic Product (bil $)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
$ other/mil $ GDP	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other Protective Packaging Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Protective Mailers	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Paperboard Protectors	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Bubble Packaging	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Insulated Shipping Containers	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Air Pillows	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Paper Fill	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Dunnage Bags	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Loose-Fill	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Molded Pulp	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Protective Packaging Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

SAMPLE TABLE

COMPANY PROFILES

Ivex Packaging LLC
8100 South 77th Avenue
Bridgeview, IL 60455
708-728-8000
http://www.ivexpackaging.com

Annual Sales: [illegible]
Employment: [illegible]

Key Products: [illegible] -seal products and bubble ma[illegible]

SAMPLE PROFILE

Ivex Pack[illegible] ialty packaging products. The [illegible] LLC (Greenwich, Connect[illegible] ng firm that is itself a subsidiar[illegible] Connecticut).

The Company's protective packaging products include mailers, corrugated board, void-fill, cold-seal products and bubble material. Ivex Packaging's mailers include JET-PAK padded, JET-COR corrugated, JET-LITE paper, JET-LITE POLY priority and bubble mailer types. JET-PAK mailers are recyclable and sold in standard, peel-n-seal and self-sealing styles. Ivex Packaging's JET-COR rigid corrugated mailers have self-adhesive end flaps and are designed to provide edge and corner protection for shipping photographs, compact discs, digital video discs, documents and other products. The Company's JET-LITE paper mailers are available in two types: UTILITY and REINFORCED. UTILITY JET-LITE kraft mailers are made in a range of adhesive closure styles, while the REINFORCED line is made with fiberglass strands for enhanced strength. JET-LITE POLY mailers are produced using coextruded film that is designed with enhanced graphic

187

"Protective mailer demand is projected to expand 5.3 percent annually to $1.1 billion in 2012, outpacing overall protective packaging growth. Advances will be driven by opportunities in bubble mailers, which will account for over 70 percent of the mailer market. Bubble mailers have performance advantages over their macerated paper, foam-lined and rigid paperboard competitors. Growth drivers include ..."

--Section V, pg. 90

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Other Studies

Pharmaceutical Packaging

The US drug packaging industry is analyzed in this study. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by material (e.g., plastic resins, paper and paperboard, aluminum foil, glass, plastic film, converted foil); product (e.g., blister packs, bottles, pouches and strip packs, prefillable inhalers and syringes, tubes, vials and ampuls, labels, track and trace accessories); and market. The study also considers market environment factors, evaluates company market share and profiles industry players.

#2341 .... 06/2008..................... $4700

Corrugated & Paperboard Boxes

US demand for boxes will reach $39.9 billion in 2012. Gains will be driven by the increased production of goods, a shift toward higher-value boxes and the continued popularity of Internet shopping. Corrugated and solid-fiber boxes will remain dominant and offer the best growth opportunities. This study analyzes the $35.3 billion US corrugated and paperboard box industry, with forecasts for 2012 and 2017 by material, product and market. It also evaluates company market share and profiles major players.

#2312 .... 02/2008..................... $4500

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

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

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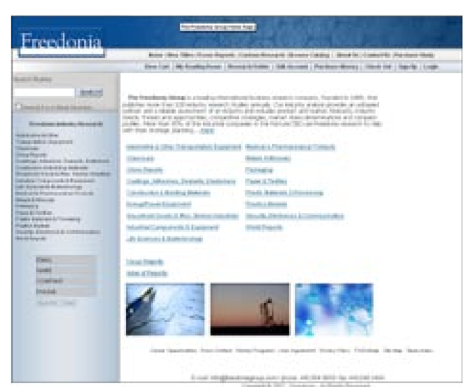

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