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NEW US industry forecasts for 2012 & 2017

Pouches

Study # 2367 June 2008 $4700

US pouch demand to reach $7.9 billion in 2012

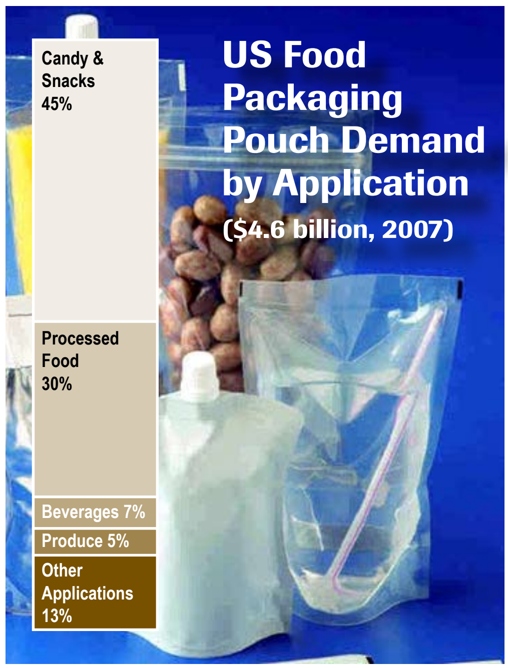
Demand for pouches in the US is forecast to reach $7.9 billion in 2012, stimulated by robust growth for stand-up pouches and healthy gains for flat pouches in a number of markets. Pouches, especially stand-up types, will continue to expand their presence based on superior qualities over many other types of packaging, including aesthetic appeal, reclosable components, portability, light weight and reduced material use.

Though stand-up pouches are fairly common in a variety of packaging applications, they remain distinctive in appearance, and demand will benefit from the ongoing emergence of new applications and continuing efforts by firms to differentiate their products with packaging that stands out.

Growth will also be fueled by advantages that make pouches an economical and environmentally-friendly packaging alternative, namely lower production costs and substantially reduced shipping costs (since pouches weigh less and require significantly less space and energy for transporting than an equivalent number of rigid containers).

Stand-up pouches to drive key food packaging market

Food and beverage markets accounted for 78 percent of pouch demand in 2007 and will expand in line with the overall industry average. Continued healthy growth will be driven by solid gains for



stand-up pouches in nearly all markets as consumers continue to be drawn to products that offer such advantages as reclosability, better portability, microwaveability, longer shelf life and minimal preparation time.

Robust gains from a small base are anticipated for pouches with beverages other than fruit drinks, especially flavored waters, sports drinks and distilled spirits. The availability of spout fitments that enable resealability and ease of dispensing comparable to those of bottles will support wider utilization of pouches in the beverage market.

Faster growth for pouches in nonfood markets will be the result of opportunities in medical and pharmaceutical markets fueled by the increased prevalence of unit dose and unit-of-use packaging of drugs and small- to medium-sized supplies and devices.

Retort pouches to grow at double-digit rates

Double-digit gains for retort pouches (which can be flat or stand-up) will be driven by expanding applications with processed foods and continued growth in the foodservice market, as safety concerns and the reduced storage space requirements of pouches are driving shifts away from #10 cans.

In flat pouches, above-average gains are anticpated for four-side-seal pouches in medical and pharmaceutical markets and food applications such as frozen foods; processed meat, poultry and seafood; and fresh and frozen meat and seafood. Flat pouch advances will also benefit from a rapidly expanding market for stick pouches with single-portion packages of products such as drink mixes, candy and sweeteners. Stick pouches, small tube-shaped pouches, offer product differentiation and are increasingly used to reinvigorate mature products.

Study coverage

This new Freedonia industry study, ***Pouches***, is priced at $4700. It presents historical demand data for the years 1997, 2002 and 2007 plus forecasts for 2012 and 2017 by product and application. The study also considers market environment factors, evaluates company market share and profiles leading competitors.

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

Pouches

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- Confirm your own internal data
- Make better business decisions

PRODUCT & MARKET OVERVIEW

Stand-Up Pouches

Demand for stand-up pouches is
billion in 2012, outpacing overall pouc
occur in all major markets as a result of
attributes of product differentiation, su
nience, freshness protection and reclos
favorable consumer perception. Moreo
that make stand-up pouches an econom
aging alternative for producers, namely lower production costs and substantially reduced shipping costs (since stand-up pouches weigh less and require less space and energy for transporting than an equivalent number of rigid containers).

While stand-up pouches have become fairly common over the past decade, especially in food packaging, they possess a distinctive appearance, especially in comparison to metal cans and paperboard cartons. The distinctive look and relative novelty of stand-up pouches will continue to be key factors influencing firms seeking to differentiate their products with packaging that stands out. The vertical orientation of stand-up pouches provides a strong billboard effect for
e-added features as handles,
facilitates neat, parallel
se the consumer appeal of

for stand-up pouches is the
and, in many cases, extremely
ewer packaging process
that does not have the high line speeds of conventional methods. For example,
manufacturing and filling processes have such high efficiencies -- like line
eds of more than 1,000 cans per minute -- compared to stand-up pouch
duction that cans will likely remain a fixture of the packaging landscape for
ny years. However, pouch machinery manufacturers are continually increas-
the line speeds of stand-up pouch equipment to handle higher throughput.

SAMPLE PAGE
Explanations that support each table's data and forecasts

COMPANY PROFILES
Profiles for 35+ competitors such as Alcan, Amcor, American Packaging, Ampac Packaging, Bemis, Exopack, Printpack and Sonoco Products

FOOD & BEVERAGE PACKAGING

Po
ackaging of pet food and treats is
pr um to $290 million in 2012, driven by a
nu uches have over conventional packaging
lik e cans, and paperboard boxes. Among
the ny instances), no need for a can opener,
ea r protection. Aside from functional
ad es -- will benefit from their larger
bi y larger, more attention-getting graphics
than a conventional metal can. In the dry food segment, pouches are increasingly replacing multiwall bags, which lack the high resistance to flex cracking and puncturing offered by pouches.

SAMPLE TEXT
Data illustrated with the aid of nearly 70 tables and charts

TABLE IV-23

PET FOOD MARKET FOR POUCHES
(million dollars)

Item	1997	2002	2007	2012	2017
Pet Food Shipments (bil $)					7
$ pouches/000$ pet food					4
Pet Food Pouch Demand					0
By Type:					
Standup					0
Flat					0
By Product:					
Dog & Cat Food					5
Pet Treats					5
Other Pet Food					0
% pet food & treats					2
Total Food & Beverage Pouches					0

SAMPLE TABLE
Historical data for 1997, 2002 and 2007 as well as Freedonia forecasts to 2012 and 2017

Source: The Freedonia Group, Inc.

Freedonia's methods involve:

- Establishing consistent economic and market forecasts
- Using input/output ratios, flow charts and other economic methods to quantify data
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Plastic Containers

This study analyzes the US plastic container industry. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by resin (e.g., HDPE, PET, polypropylene, polystyrene, PVC, LDPE, other); product (e.g., bottles and jars, tubs/cups/bowls, pails, food trays); and market (e.g., beverages, food products, household cleaning chemicals, cosmetics and toiletries, pharmaceuticals). The study also considers market environment factors, evaluates company market share and profiles leading competitors.

#2378.......................... 07/2008..............................$4600

Caps & Closures

US demand for caps and closures will rise 4.9% annually through 2012. Gains will be bolstered by the popularity of value-added designs such as child-resistant and dispensing closures. Gains will be supported by the continuing growth of closure-intensive plastic packaging at the expense of closureless containers like metal cans. This study analyzes the $7.6 billion US cap and closure industry, with forecasts for 2012 and 2017 by material, product and market. It also evaluates market share and profiles industry competitors.

#2354.......................... 06/2008.............................. $4700

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Protective Packaging

US protective packaging demand will grow 4.6% annually through 2012, driven by manufacturing growth and the proliferation of Internet commerce. Fastest advances are anticipated for air pillows and insulated shipping containers, with protective mailers and bubble packaging also logging above-average growth. This study analyzes the $4.1 billion US protective packaging industry, with forecasts for 2012 and 2017 by product, material and application. It also evaluates company market share and profiles major players.

#2316.......................... 05/2008..............................$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

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

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The Freedonia Group, Inc. 767 Beta Drive Cleveland, OH 44143-2326 USA **website:** www.freedoniagroup.com
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