Produce Packaging

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

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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

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

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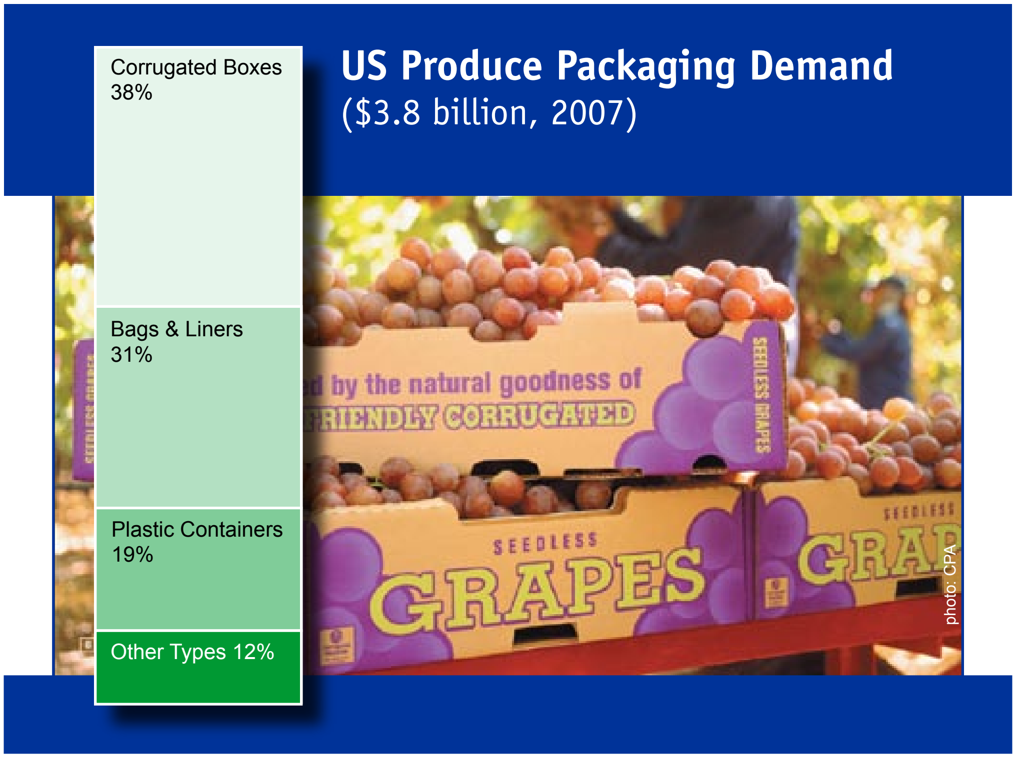
Growth will be fueled in part by increased produce production, healthier eating habits and rising demand for fresh-cut produce, which uses more value-added packaging than bulk produce.

US demand to rise 4.2% annually through 2012

Demand for produce packaging in the US is forecast to climb 4.2 percent yearly to $4.7 billion in 2012. Accelerated produce production will boost packaging unit advances, though value gains will decelerate as prices rise more slowly than in the 2002-2007 period. Growth will outpace overall food packaging and be fueled by increased produce production, growth in consumer spending, trends toward healthier eating and rising demand for fresh-cut produce, which tends to use more value-added packaging than bulk produce. Demographic trends such as smaller average household sizes, the aging of the population, growth in the number of households where all adults work, and expanding Hispanic and Asian populations will also bode well for produce consumption, including convenience-oriented products.



Plastic containers to be fastest growing segment

Corrugated boxes will remain the leading produce packaging product type through 2012. While box demand will increase at a slower than average pace, advances will be driven by the expanded prevalence of more costly box types such as modular boxes, white-top linerboard boxes and moisture-resistant recyclable boxes. Plastic containers will experience the fastest gains, resulting from continued favorable increases in berry production and expanding applications for clamshells, bowls and other plastic containers in other produce uses, especially ready-to-eat, fresh-cut produce.

Bags to benefit from modified atmosphere films

Bag and liner demand is expected to increase nearly in line with the overall produce packaging average, decelerating from the 2002-2007 pace as the salad market becomes more mature. Still, advances will be aided by continued volume increases for bagged salads and other ready-to-eat produce, which are primarily packaged in plastic bags, with many products using value-added modified atmosphere packaging films to prolong shelf life. Though reduced in-store repackaging of produce will constrain tray demand, the popularity of precut vegetables packaged in microwaveable trays will provide a growth niche. Prospects for other packaging types will vary, with the maturity of a number of products limiting gains. Above-average growth is expected for reusable plastic containers (RPCs), though advances will level off from the 2002-2007 pace as a result of the increased base of existing RPCs. RPCs will continue to carry only a fraction of US produce volume, resulting from the well-established position of corrugated containers and the reluctance of retailers to make the capital investment required to accommodate RPCs.

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Sample Text, Table & Chart

PACKAGING TYPES

Corrugated Boxes

Corrugated boxes are the largest single packaging type f
representing 38 percent of demand in 2007. A variety of cor
es are used in this market, such as standard one-piece boxes w
full telescoping boxes, boxes with separate lids, boxes with v
boxes with cut-outs for display purposes, open-top tray-style
fold-over gift boxes and various bulk bin configurations. Pro
generally range from 10 to 100 pounds in volume, with 30- to
types the most typical. Produce boxes frequently contain ve
increased air flow and for efficient removal of field heat duri
Bulk bins for produce can hold as much as 1,000 pounds, alth
most common bin sizes are 450 to 550 pounds. Boxes find u
fresh produce applications, with tomatoes, salad, citrus, berri
apples and potatoes standing out as leaders.

Demand for cor ... ce applicati
projected to increase ... billion in 2
demand will expand ... illion, a slight accel-
eration from the pace ... ction of citrus fruit
rebounds from a low ... g unit gains will be solid
growth for fresh-cut p... regional firms. Value
advances will trail the overall produce packaging average based on relatively modest produce volume expansion, slower price increases than in the 2002-2007 period, and the maturity of most applications. Still, value gains will reflect the expanded prevalence of more costly box types such as modular boxes, white-top linerboard boxes and moisture-resistant recyclable boxes. White-top linerboard boxes are produced with a layer of white pulp over unbleached kraft. These boxes will gain ground based on their excellent graphics properties, which enhance the visual appeal of boxes and help differentiate commodity items, especially since produce boxes frequently double as point-of-purchase display containers.

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SAMPLE TEXT

TABLE III-7

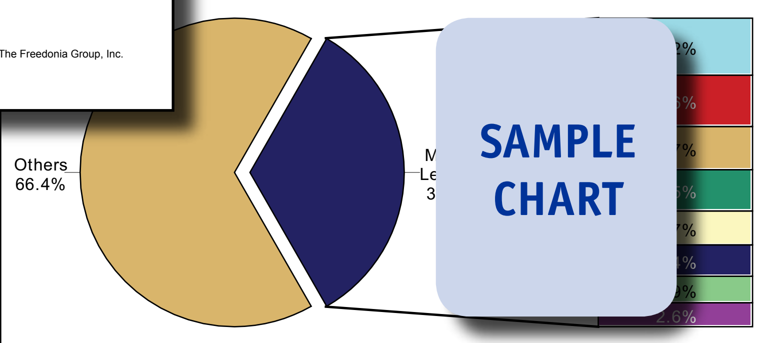
PLASTIC CONTAINER DEMAND IN PRODUCE PACKAGING
(million dollars)

Item	1997	2002	2007	2012	2017
Fresh Produce Production (bil lb)					
units/000 lb produce					
Plastic Container Demand (mil units)					
cents/unit					
Plastic Container Demand					
By Type:					
Clamshells					
Tubs, Cups & Bowls					
Other					
By Application:					
Vegetables					
Fruit					
Salad					
% plastic containers					
Total Produce Packaging Demand					3810

SAMPLE TABLE

CHART VI-1

...RODUCE PACKAGING MARKET SHARE, 2007
($3.8 billion)



SAMPLE CHART

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Sample Profile, Table & Forecast

TABLE IV-1

PRODUCE PACKAGING DEMAND BY APPLICATION & FORMAT (million dollars)

Item	1997	2002	2007	2012	2017
Fresh Produce Production (bil lb)					2.3
$ pkg/000 lb produce					63
Produce Packaging Demand					10
By Application:					
Vegetables					60
Fruit					60
Salad					90
By Format:					
Bulk					60
Ready-to-Eat					850

SAMPLE TABLE

COMPANY PROFILES

AEP Industries Incorporated
125 Phillips Avenue
South Hackensack, NJ 07606
201-641-
http://wv

Sales: $
US Sales
Employ

Key Pro s, polyvinyl chloride films and

SAMPLE PROFILE

AEP Industries manufactures and distributes commodity and specialty plastic packaging films used in the packaging, transportation, food and beverage, automotive, pharmaceutical, chemical, electronic, construction, textile and agricultural markets. The Company operates through ten product divisions: Stretch Film, RESINITE PVC Films, Institutional Products, Retail Products, FLXTITE Shrink Films, PRO-FORMANCE Films, Custom Films, Agricultural Products, Printing and Converting, and FIAP Films.

The Company is active in the US produce packaging industry through the PROFORMANCE Films, RENSINITE PVC Films and Retail Products divisions. AEP Industries' PROFORMANCE Films division manufactures monolayer blown films and multilayer coextruded films for food packaging and other applications. For example, the division's B-100 monolayer blown films include low-density polyethylene (LDPE), linear LDPE (LLDPE), medium-density polyethylene (MDPE), linear MDPE, metallocene-based LLDPE, ethylene vinyl acetate and ethylene methyl acrylate copolymer varieties for use in fresh cut produce packaging applications, among others.

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"Demand for salad packaging is projected to expand 6.2 percent annually to $735 million in 2012, offering the best opportunities among major produce applications. Though decelerating from the pace of the past decade as the market matures, gains will be based on continued volume growth and product development activity for fresh-cut salads and salad mixes, both in retail and foodservice channels."

--Section IV, pg. 160

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Other Studies

Sterile Medical Packaging

This study analyzes the US sterile medical packaging industry. It presents historical demand data (1997, 2002 and 2007) and forecasts for 2012 and 2017 by product (e.g., thermoformed trays, sterile pouches, prefillable syringes, vials, IV containers, sterile blister packs and clamshells, sterile bags, sterile plastic bottles), application (e.g., drugs, medical supplies and devices, diagnostic products); and material. The study also considers market environment factors, evaluates company market share and profiles industry players.

#2405 .... 09/2008..................... $4600

Plastic Containers

US plastic container demand will grow 5.4% annually through 2012, driven by plastic's many advantages over other packaging media. Plastic bottles and jars will remain the dominant category, while other types such as plastic cans and squeeze tubes grow the fastest. PET will continue as the leading plastic container resin. This study analyzes the 13.5 billion pound US plastic container industry, with forecasts for 2012 and 2017 by resin and product. It also evaluates company market share and profiles industry competitors.

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

Pouches

Demand for pouches in the US will climb 6.1% annually through 2012. Stand-up pouches will exhibit robust advances, while flat pouches will post healthy gains in a number of markets. The largest market, food and beverages, will continue to experience healthy growth. This study analyzes the US market for pouches, with forecasts for 2012 and 2017 by product and market. It also considers market environment factors, evaluates company market share and profiles industry participants.

#2367 .... 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

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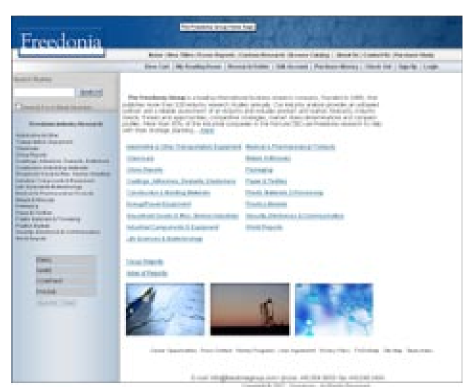

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