High Visibility Packaging:
Clamshells, Blisters & Other

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

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

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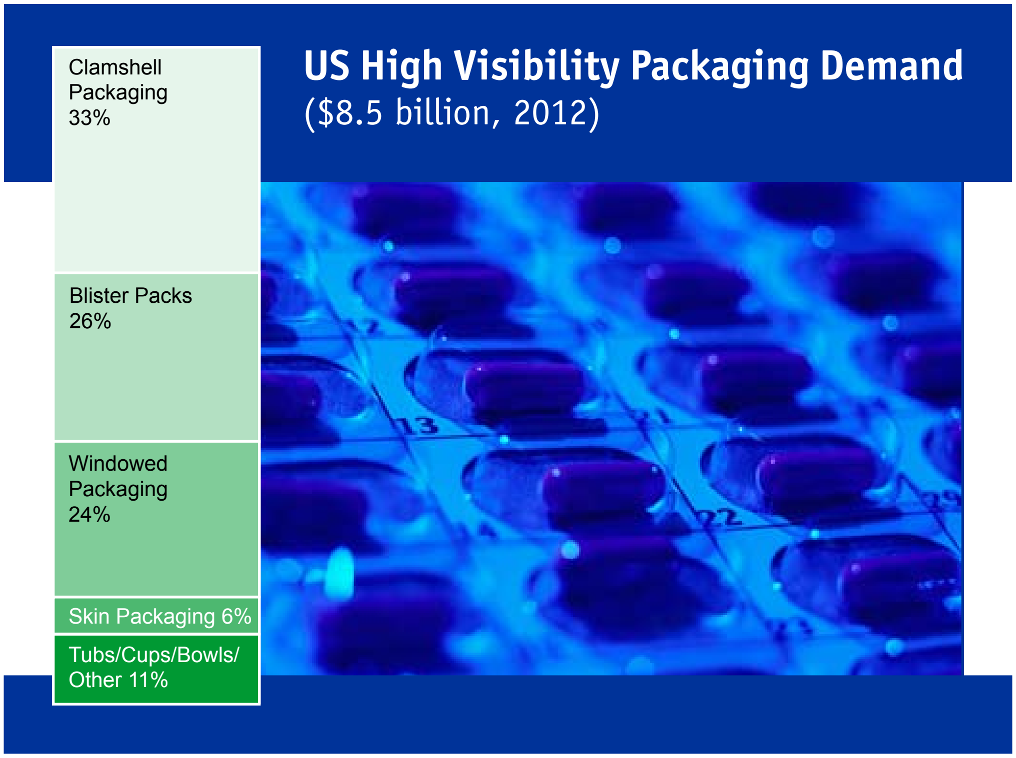
Gains will reflect rising disposable personal income levels, the influence of mass market retailers, consumer convenience and the cost and performance efficiency of high visibility packaging.

US demand to grow 4% annually through 2012

US demand for high visibility packaging is projected to expand 4.0 percent yearly to $8.5 billion in 2012. Gains will reflect rising disposable personal income levels, the influence of mass market retailers, and the cost and performance efficiency of high visibility packaging. Average prices for high visibility packaging are assumed to grow less than one percent annually to over 25 cents per unit in 2012. This is a significant deceleration from the 2002 to 2007 pace, which was driven by escalating crude petroleum and natural gas prices. Low cost, market aesthetics and consumer convenience will remain the main drivers of high visibility packaging demand.



Blister packs, clamshells and other high visibility containers are valued packaging configurations due to their ability to showcase products and provide theft and tamper deterrence, while reducing the need for sales personnel. Nonetheless, further high visibility packaging advances will be threatened by environmental concerns over excessive packaging, and continued growth in the offshore production and packaging of products such as toys, games, sporting goods, hardware and electronics.

Clamshells, blister packs hold best opportunities

Clamshell packaging and carded blister packs together accounted for 56 percent of high visibility packaging demand in 2007. Clamshells will present the best opportunities and expand 5.0 percent annually to 2012 due to ebullient gains in food markets such as fresh produce and prepared foods. Clamshell demand will also benefit from their upscale appearance; thick, rigid construction; clarity; and ability to deter theft and tampering. Current efforts focus on making clamshell packages easier to open. Blister pack demand is expected to rise 4.4 percent per annum to $2.2 billion in 2012, fueled by healthy gains for pharmaceutical packaging. Blister packs use less plastic than clamshells and are more amenable to sustainable packaging.

Windowed packaging demand is expected to increase only 2.1 percent annually to 2012. Advances will reflect opportunities in areas such as fresh produce, and cosmetics and toiletries. Nonetheless, below-average growth is anticipated as a result of subdued demand in major markets such as baked goods, and intense competition from imported products. Skin packaging will register the slowest growth based on diminished demand for carded skin packs, due to their higher production cost and growing offshore production of toys, hardware and other goods. Strong growth is forecast for the niche segment of high visibility tubs, cups and bowls, due to opportunities in the packaging of baked goods, produce, snacks, candies and other foods.

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Sample Text, Table & Chart

TABLE VI-2

FOOD MARKETS FOR HIGH VISIBILITY PACKAGING
(million dollars)

Item	1997	2002	2007	2012	2017
Food Product Shipments (bil $)					
$ pkg/000$ food shpts					
High Visibility Food Pkg Markets					
Baked Goods					
Prepared & Frozen Foods					
Fresh Produce					
Meat, Poultry & Seafood					
Cheese					
Other Foods					
% food					
High Visibility Packaging Markets					

SAMPLE TABLE

PRODUCTS

Carded Blister Packs

Demand for carded blister packs is forecast to grow
per year to $ billion units.
will reflect f uch as pharm
cosmetics, to ce supplies a
The pharma offer good p
US Food an that require
pharmaceuti ursing home
aged in unit hese regulatio
to reduce medication dispensing errors, and favor blister p
which is ideally suited to unit dose packaging. Other grow
for blister packs include enhanced child safety features ar
growth in the number of medications that are packaged in

SAMPLE TEXT

Carded blister pack demand will also be fostered by the negative perception of clamshells as extremely difficult to open. Retailers are also adopting more consumer friendly packaging in light of consumer concerns over difficult-to-open packages. Carded blister packs also have the benefit of lower resin consumption than clamshells, making them a more economical alternative.

Performance advantages will also bolster demand for carded blister packs. For instance, carded blisters improve space utilization in stores, as the packages can often be hung on pegs, thereby freeing up valuable shelf space. Additionally, blister packs allow consumers to view the package contents while providing adequate theft and tamper protection -- key benefits for large retailers where customer service and supervision is minimal compared to higher-end department and specialty stores. Product innovations will also boost demand. For example, in early 2006 Costco began packaging certain cosmetic products in a blister pack configuration that involves securing an item within two plastic blisters, which are then sealed between two solid bleached sulfate (SBS)

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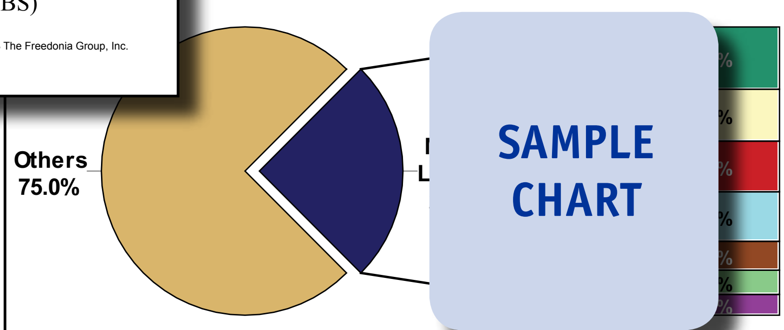
CHART IX-2

US HIGH VISIBILITY PACKAGING SALES BY COMPANY, 2007 ($6.95 billion)



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Sample Profile, Table & Forecast

TABLE VIII-1

OTHER MARKETS FOR HIGH VISIBILITY PACKAGING
(million dollars)

Item	1997	2002	2007	2012	2017
Consumer Nondurable Expend (bil $)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
$ pkg/000$ consumer nondurables	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other High Visibility Pkg Markets	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Cosmetics & Toiletries	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Hardware	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Sporting Goods, Toys & Games	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Motor Vehicle Parts & Accessories	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Electronic Products	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
All Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
High Visibility Packaging Markets	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

SAMPLE TABLE

COMPANY PROFILES

Anchor Packaging Company
13515 Barrett Parkway Drive
St. Louis, MO 63021
314-822-7800
http://www.an[illegible]

Annual Sales: [illegible]
Employment: [illegible]

Key Products: [illegible]

SAMPLE PROFILE

Anchor P[illegible] thermoformed containers and [illegible] food processing industries. The privately held company is a wholly owned subsidiary of Hermann Companies Incorporated (St. Louis, Missouri), a holding firm.

It participates in the US high visibility packaging industry through the manufacture of various thermoformed containers made from such materials as polypropylene, polyethylene terephthalate (PET), polystyrene and polyvinyl chloride (PVC). These containers can be used for packaging baked goods, sandwiches, delicatessen items, fresh prepared food, fresh-cut produce and other foods. Anchor Packaging markets thermoformed containers under such brand names as MICRORAVES, DELI VIEW, CULINARY CLASSICS, MICROLITE, BONFAIRE, GOURMET CLASSICS, FRESH VIEW and CRYSTAL CLASSICS.

Products -- MICRORAVES containers from Anchor Packaging mostly consist of black polypropylene bases and clear polypropylene or PET lids. Among the Company's MICRORAVES product line is the INCREDI-BOWL series, which includes polypropylene bowls and lids

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"Demand for unit dose ethical drug blister packs is projected to increase 6.2 percent annually to $108 million in 2012. Most gains will involve pharmaceuticals distributed to hospitals, where the risk of medication dispensing errors is the greatest. By contrast, the use of blister packs for retail dispensed ethical drugs will remain limited due to cost disadvantages versus prescription dose and bulk plastic bottles."

--Section VII, pg. 150

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Other Studies

Paper versus Plastic in Packaging

This study analyzes selected US markets where plastic and paper packaging compete. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by product (e.g., cartons, bottles, retail bags and sacks, protective packaging, tubs and cups, trays, shipping drums and sacks) and market (e.g., produce, meat, poultry and seafood, milk, dairy products, fruit beverages, candy and confections, egg cartons). The study also considers market environment factors, evaluates market share and profiles industry players.

#2443 .... 01/2009..................... $4700

Cups & Lids

US demand for cups and lids will advance 4.3% annually through 2012. Drinking cups will remain the dominant cup type while packaging cups will grow the fastest. Growth in lids will outpace cups as more drinking cups use lids, especially higher-value specialty lids. Foodservice will remain the dominant market while food packaging grows more rapidly. This study analyzes the $6.3 billion US cup and lid industry, with forecasts for 2012 and 2017 by product and market. It also details market share and profiles major players.

#2429 .... 11/2008..................... $4600

Produce Packaging

US produce packaging demand will rise 4.2% yearly through 2012. Corrugated boxes will stay the top segment, driven by a shift toward more costly types (e.g., modular, lined, moisture-resistant recyclable). Plastic containers will grow the fastest based in part on the expanding use of clamshells and bowls in ready-to-eat, fresh-cut produce. This study analyzes the $3.8 billion US produce packaging industry, with forecasts for 2012 and 2017 by type, application and end user. It also evaluates market share and profiles industry players.

#2388 .... 08/2008..................... $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

Plastic Film

US demand for plastic film will reach 16 billion pounds in 2012. Gains will reflect film's cost, performance and source reduction advantages over rigid packaging, as well as opportunities in products such as pouches and modified atmosphere packaging. LDPE will remain the top film, while the lower volume degradable plastic segment leads gains. This study analyzes the $25.4 billion US plastic film industry, with forecasts for 2012 and 2017 by type, application and market. It also evaluates market share and profiles industry players.

#2371 .... 07/2008..................... $4700

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