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Food Containers: Rigid & Flexible

US Industry Study with Forecasts for **2013 & 2018**

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The Freedonia Group

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 *2013 & 2018*

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Table of Contents

(continued on next page)

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Table of Contents

COMPANY PROFILES

(continued from previous page)

List of Tables/Charts

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

FOOD CONTAINER MARKETS

CONTAINER OVERVIEW

BAGS & POUCHES

PAPERBOARD FOOD CONTAINERS

METAL FOOD CONTAINERS

PLASTIC FOOD CONTAINERS

GLASS FOOD CONTAINERS

INDUSTRY STRUCTURE

Unit expansion will be aided by the growing popularity of single-serving packaging, such as plastic cups and pouches, to meet consumer demand for convenience and portability.

US demand to increase 2.5% yearly through 2013

US demand for food containers is projected to increase 2.5 percent per year through 2013. Advances will be based on an expanding population base, real growth (albeit decelerated) in disposable personal income, smaller household sizes, consumer demand for foods offering a combination of convenience and value, and trends toward value-added packaging providing enhanced freshness protection and convenience of use. Unit expansion will be aided by the growing popularity of single-serving packaging, such as plastic cups and pouches, in a widening range of applications, with such formats increasingly chosen to meet consumer demand for food products offering convenience and portability.

US Food Container Demand, 2008
($22 billion)

Plastic containers, bags, pouches to lead gains

Plastic containers, and bags and pouches will experience the fastest growth among food container types, often supplanting paperboard, metal and glass containers. Gains for plastic containers will be attributable to performance advantages over glass, metal and paperboard alternatives, as well as improved resin and processing technologies. While rapid price increases in recent years have reduced plastic's cost advantage versus paper, metal and glass, plastic containers have a well-entrenched market position and their performance advantages will sustain continued opportunities. Advances for bags and pouches will be the result of cost and performance advantages that will enable continued inroads into rigid packaging applications. Moreover, the source reduction advantages of flexible packaging such as bags and pouches will support gains as brand owners seek to enhance the environmental friendliness of their packaging.

Prospects in the more mature paperboard, metal and glass food container segments will be less favorable, though growth niches will exist. For instance, paperboard food container demand will be aided by heightened demand for recycled content packaging and the promotion of paper as a renewable resource as part of efforts to "go green" in packaging. In addition, aseptic cartons will log robust gains in soups and canned specialties, and sauces and condiments, often at the expense of metal cans. Despite losses to alternatives, greater use of cans with differentiating features such as easy-opening and/or resealable tops and nontraditional can types, such as retortable aluminum bowls and shaped cans, is anticipated. Moreover, cans will remain an important segment of the food container mix due to their long shelf life and lower cost. Glass will remain an important part of the container mix in certain markets -- despite losing market share to plastic containers -- based on the relatively stable pricing, long shelf life and a high quality image of glass.

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Sample Text, Table & Chart

TABLE VI-3

FOLDING CARTON DEMAND IN FOOD APPLICATIONS (million dollars)

Item	1998	2003	2008	2013	2018
Paperboard Food Carton Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% folding cartons	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Folding Carton Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Grain Mill Products	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Baked Goods	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Frozen Specialties	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Dairy Products	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Meat & Related Products	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Candy & Confectionery	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other Foods	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
cents/unit	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Folding Carton Demand (mil units)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

SAMPLE TABLE

FOOD CONTAINER MARKETS

Egg Cartons -- Demand for egg cartons is proj... ...million in 2013, with unit de... ...billion cartons. Relatively ... ...eases in egg consumption d... ...h benefits of eggs. Egg de... ...s over the high cholesterol ... ...r cholesterol egg substitute... ...ggs and related egg cartons ... ...ne baking activity in favor ... ...meals being consumed away... ...d for plastic egg cartons, oft... ...erparts.

SAMPLE TEXT

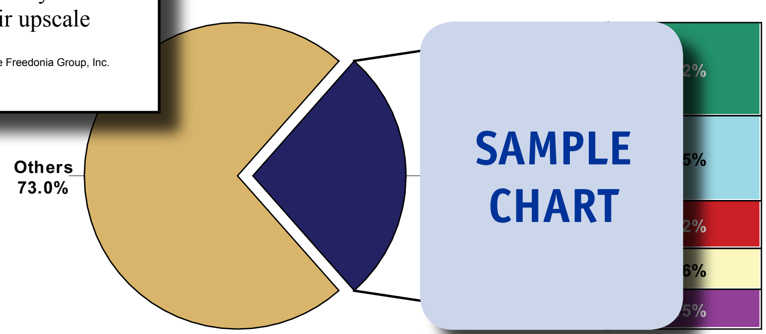
...nand is projected to increase... ...13. Gains will be based on advantages over molded pulp egg cartons in terms of cushioning, insulation, graphics capabilities and production efficiency. The dominant plastic egg carton material is foamed polystyrene, which offers superior cushioning and moisture resistance compared to molded pulp cartons, important considerations in egg packaging. Despite a loss of market share in the early 1990s based largely on environmental considerations, polystyrene has once again captured the lead in egg carton production in unit terms and will slightly increase its dominance over the next decade. Nonetheless, molded pulp's favorable environmental qualities and growing demand for organic and cage-free eggs will prevent plastic egg cartons from capturing more of the shell egg market.

In addition to polystyrene foam, clear egg cartons produced from polyethylene terephthalate (PET), including recycled content variety, are also available. These cartons are significantly higher in price than foam cartons and account for only a fractional share of the market. They are typically used for packaging premium shell eggs based on their upscale

92

CHART X-1

FOOD CONTAINER MARKET SHARE, 2008 ($22.1 billion)



SAMPLE CHART

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Sample Profile, Table & Forecast

TABLE VIII-4

PLASTIC FOOD JAR DEMAND

Item	1998	2003	2008	2013	2018
Plastic Food Bottles & Jars (mil units)	55				400
% jars					.5
Plastic Food Jar Demand (mil units)					00
ounces/unit					.4
Resin Use in Jars (mil lbs)					80
Polyethylene Terephthalate					09
High Density Polyethylene					58
Other Resins					13
cents/unit					.0
Plastic Food Jar Demand (mil $)					45
Sauces & Condiments					70
Coffee & Tea					79
Snack Foods					64
Other Foods	44	[illegible]	121	172	232

SAMPLE TABLE

COMPANY PROFILES

Crown Holdings Incorporated
One Crown Way
Philadelphia, PA 19154
215-698-5100
http://www.crowncork.com

Sales: $
US Sales
Employ

Key Pro d aerosol cans

Cro wn Cork & Seal Company a), a leading worldwide supp Crown Cork & Seal operates in six segments: Americas Beverage, North America Food, European Beverage, European Food, European Specialty Packaging and Other.

SAMPLE PROFILE

The Company participates in the US food containers industry primarily through the North America Food segment, which reported 2008 sales of $905 million. The segment's activities include Crown Cork & Seal's operations in the US and Canada that manufacture aluminum and steel food cans and ends, among other items. The company's metal food cans are produced in a range of shapes and sizes for packaging fruits, vegetables, seafood, meat, soups, prepared entrees, dry food and pet food. These cans can be equipped with PEELSEAM peelable or EASYLIFT pull-tab ends. Among the segment's customers are such food marketers as ConAgra Foods Incorporated (Omaha, Nebraska), HJ Heinz Company (Pittsburgh, Pennsylvania), Mars Incorporated (McLean, Virginia), Bonduelle SA (France), Nestle SA (Switzerland) and Premier Foods plc (UK).

348

"Demand for plastic food bottles and jars is forecast to increase 5.0 percent annually to $2.1 billion in 2013, representing 13.7 billion units. Gains will decelerate from the 2003-2008 period due in part to more moderate resin price increases. Advances will also be tempered by saturation in certain bottle markets like edible oils and, to a lesser extent, sauces and condiments, where the conversion from glass to plastic packaging is well established. Jar demand will increase more rapidly than bottle demand as a result of further plastic supplantation in traditional glass applications. Overall bottle and jar increases will be supported by ..."
--Section VIII, pg. 235

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Other Studies

Green Packaging

US demand for packaging designed to lessen environmental impact is projected to grow 3.4% annually through 2013. Biodegradable plastic packaging and recycled content plastic packaging will grow the fastest. Reusable plastic containers and intermediate bulk containers will pace gains in the reusable packaging segment. This study analyzes the $37 billion US green packaging industry, with forecasts for 2013 and 2018 by type and market. It also evaluates company market share and profiles industry players.

#2471 .... 03/2009.................... $4700

Paper vs Plastic in Packaging

US demand for plastic packaging will continue to outpace paper in markets where they compete, albeit more slowly as applications mature. The fastest market share increases for plastic will occur in pet food and soy beverage packaging, followed by protective packaging, foodservice and dairy products, among others. This study analyzes selected competitive markets in the US for paper and plastic packaging, with forecasts for 2012 and 2017 by material and market. It also discusses market leaders 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

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

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