Meat, Poultry & Seafood Packaging

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

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TECHNOLOGY & RAW MATERIALS

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INDUSTRY STRUCTURE

Gains will be driven by an expansion in meat, poultry and seafood production, as well as the continuing shift to case-ready packaging by many retailers as a means to reduce in-store labor costs.

US demand to grow 3.5% annually through 2013

Demand for meat, poultry and seafood packaging is expected to increase 3.5 percent annually to $9.2 billion in 2013. Gains will be driven by an expansion in meat, poultry and seafood production, as well as the continuing shift to case-ready packaging by many retailers as a means to reduce in-store labor costs. Case-ready packaging typically employs higher cost trays and high barrier films, thus boosting value gains. Packaging demand will also be supported by changes in packaging practices, such as the increasing prevalence of meat and poultry items in smaller, more convenient sizes and the expanding range of products that are further processed. These products, which typically use more packaging relative to their volume than larger unprocessed items, will continue to be favored by consumers looking for foods that are easy and quick to prepare, and easy to store. However, value gains will slow from the 2003-2008 period as a result of a moderation in prices of such raw materials as plastic, metal and paper.

Flexible packaging to continue outpacing rigid

Flexible packaging demand will continue to outpace rigid packaging, advancing at a 4.4 percent annual pace to $4 billion in 2013. Growth will be driven by favorable prospects for high barrier film and pouches. High barrier film demand will be aided by the rising percentage of meat in case-ready packaging, which requires value-added materials to extend shelf life and otherwise protect the contents during shipping and handling. Healthy gains for pouches will result from further penetration of retort pouches into traditional can applications, as well as continued inroads by stand-up pouches in frozen meat, poultry and seafood applications due to pouches' high visual appeal and ability to be displayed vertically in upright freezer cases.

Below-average gains for rigid packaging will reflect maturity in the large corrugated box segment and declines in the metal can segment. However, gains will be supported by healthy growth for plastic containers and trays. Plastic container advances will benefit from the increasing presence of prepared meat and poultry items in grocery stores, warehouse clubs and other retail establishments as a result of heightened consumer demand for convenience foods that require little or no preparation. Tray demand will be boosted by increasing use of case-ready packaging, much of which relies upon foam and higher value rigid barrier trays. Demand for packaging accessories such as labels will be bolstered by regulations requiring country-of-origin labels on a wide range of meat and seafood items.

Sample Text, Table & Chart

TABLE IV-7

PAPERBOARD SLEEVE DEMAND IN MEAT, POULTRY & SEAFOOD PACKAGING (million dollars)

SAMPLE TABLE

Item	1998	2003	2008	2013	2018
Total Meat, Poultry & Seafood Pkg					0
% sleeves					9
Paperboard Sleeve Demand					5
By Application:					
Meat					2
Poultry					4
Seafood					9
By Market:					
Processed					4
Fresh & Frozen					1
% sleeves					9
Rigid Meat, Poultry & Seafood Pkg					0

PRODUCTS

Sleeves

SAMPLE TEXT

Demand for paperboard sleeves used in meat, poultry a packaging is forecast t annum to $ 2013, faster than the r slowing fr 2008 pace as material ill be helpe good graphic qualitie e billboard appealing images of t ote brandi In addition, sleeves pr r recipes, information and other or the cons mand for sleeves will also be bolstered by healthy prospects containers in meat, poultry and seafood applications, since s often used in tandem with such containers.

Paperboard sleeves, an offshoot of folding cartons, were originally developed for multipacks of beverages. Sleeves have long been used in hot dog packaging, where the sleeve holds together two smaller flexible plastic packages. Aside from this utilitarian function, sleeves can convey a premium image to their contents, enabling products to stand out in retail meat cases. While sleeves wholly or partially obscure the consumer's view of the contents, the ability to display high-quality, eye-catching graphics and photographs can be a major asset given that the actual contents -- such as raw ground poultry -- often have a bland appearance. For example, Hormel's Jennie-O Turkey Store subsidiary utilizes a distinctively printed paperboard sleeve as outer packaging for its overwrapped foam trays of fresh turkey products. In December 2008, Gold'n Plump Poultry began using a narrow paperboard sleeve for its JUST BARE antibiotic- and hormone-free chicken fillets, which are packaged in a clear, overwrapped plastic tray.

Sleeve gains will be limited by competition from alternatives such as pouches, printed shrink films and reusable plastic containers. For example, competition from stand-up pouches in processed applications

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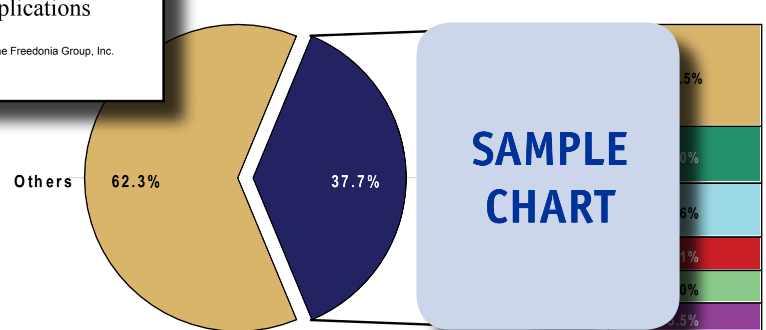
CHART VI-1

US MEAT, POULTRY & SEAFOOD PACKAGING MARKET SHARE, 2008 ($7.7 billion)



Sample Profile, Table & Forecast

TABLE V-6

FRESH & FROZEN MEAT, POULTRY & SEAFOOD PACKAGING DEMAND (million dollars)

Item	1998	2003	2008	2013	2018
F/F Meat, Poultry & Seafood (bil $)					
$ pkg/000$ fresh/frozen meat					
Packaging Demand					
By Type:					
Rigid					
Boxes					
Trays					
Other					
Flexible					
Plastic Film					
Bags					
Pouches					
Paper & Foil					
Accessories					
By Product:					
Meat					
Poultry					
Seafood					
% fresh & frozen					
Total Meat, Poultry & Seafood Pkg					

SAMPLE TABLE

COMPANY PROFILES

Vector Packaging Incorporated
2021 Midwest Road, Suite 307
Oak Brook, IL 60523
630-434-0040
http://www.ve

Annual Sales:
Employment:

Key Products:

SAMPLE PROFILE

Vector Pa
products, prima
industries. The Company is privately held.

The Company is active in the US meat, poultry and seafood packaging market through the production of films, shrink bags and casings. For example, Vector Packaging's films include FRESH WRAP barrier shrink lidding and VECTOR B-5 high-barrier shrink varieties. FRESH WRAP barrier shrink lidding films are engineered for the modified atmosphere packaging of various meat and poultry products. These films, which provide a high oxygen barrier to extend shelf life of packaged meats, feature high clarity and anti-fogging properties. FRESH WRAP films can seal to either plastic or foam trays. VECTOR B-5 high-barrier shrink films are intended for packaging such foods as luncheon meats for horizontal form/fill/seal cook-in processing applications.

Shrink bags from Vector Packaging include VECTOR 80, VECTOR 40 and VECTOR 30 products. VECTOR 80 shrink bags are high-abuse packages designed for bone-in meat packaging. These bags offer enhanced clarity and puncture resistance. The Company's VECTOR 40 shrink bags are engineered for boneless meat packaging and cook-in

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"Demand for packaging in meat applications is expected to increase 3.4 percent per annum to $5.1 billion in 2013. Gains will be driven by healthy growth in plastic film as case-ready packaging continues to expand its presence, stimulating demand for higher performing, high barrier film that can provide extended shelf life and product protection during shipping and handling. Although ongoing health concerns over fat and cholesterol intake have led to a long-term decline in per capita red meat consumption, packaging opportunities will be fostered by ..."
--Section V, pg. 146

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Other Studies

Active & Intelligent Packaging

This US active and intelligent packaging industry is analyzed in this study. It presents historical demand data (1998, 2003, 2008) and forecasts for 2013 and 2018 by product (e.g., gas scavengers, moisture control, antimicrobial, flavor and fragrance control, self-venting and air-releasing, susceptor, time-temperature indicator, pharmaceutical diagnostic, RFID-enabled) and market (e.g., food, beverages, drugs, electronics). The study also considers market environment factors, details market share and profiles industry players.

#2515 .... 07/2009.................... $4700

World Labels

Global label demand will grow 4.3% yearly through 2013. The dominant pressure sensitive segment will continue to see above-average gains. The Asia/Pacific region will expand market share, driven by China and India. The US will remain strong among developed markets. This study analyzes the 39.5 billion square meter world label industry, with forecasts for 2013 and 2018 by application method, material, printing technology, market, world region and for 19 countries. It also evaluates market share and profiles industry players.

#2499 .... 06/2009.................... $5800

Food Containers: Rigid & Flexible

US food container demand will reach $25 billion in 2013. Unit expansion will be aided by the growing popularity of single-serving packaging in a widening range of applications. Plastic containers, and bags and pouches will see the fastest growth, often supplanting paperboard, metal and glass containers. This study analyzes the $22 billion US rigid and flexible food container industry, with forecasts for 2013 and 2018 by type and market. It also evaluates company market share and profiles industry competitors.

#2492 .... 05/2009.................... $4800

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

High Visibility Packaging: Clamshells, Blisters & Other

US demand for high visibility packaging will grow 4% yearly through 2012. Clamshells will present the best opportunities based on ebullient gains in food markets such as fresh produce and prepared foods, and on their upscale appearance. Blister packs will also do well, driven by healthy gains in drug packaging and their lower material usage. This study analyzes the $7 billion US high visibility packaging industry, with forecasts for 2012 and 2017 by material, product and market. It also evaluates market share and profiles major players.

#2436 .... 12/2008.................... $4700

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