INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

Lawn, Garden & Agricultural Packaging

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

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Demand will be aided by consumer preference for convenient, user-friendly packaging, which will stimulate sales of reclosable pouches, dispensing closures and other value-added products.

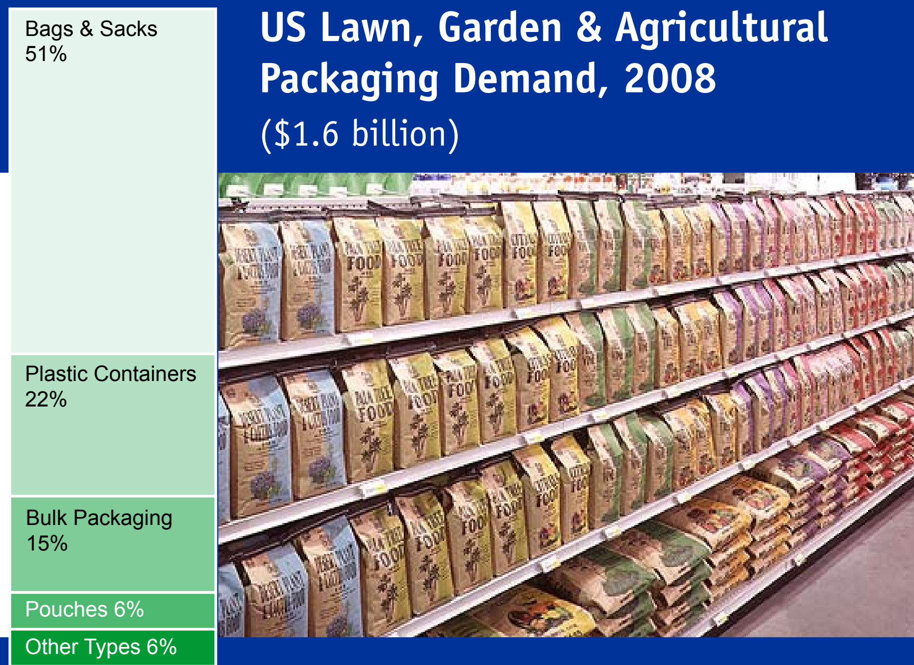
US demand to reach $1.7 billion in 2013

Demand for lawn, garden and agricultural packaging is forecast to increase 1.8 percent per year through 2013 to $1.7 billion, decelerating from the sharp increases of the 2003-2008 period as raw material prices moderate. Gains will be bolstered by the continuing need for packaging that can provide a means of differentiating products which are primarily commodity in nature. Moreover, demand will be aided by consumer preference for convenient, user-friendly packaging, a factor that will stimulate sales of reclosable pouches, dispensing closures and other value-added products. Additionally, demand will benefit from an acceleration in consumer lawn and garden spending and a rebound in the residential construction market after the declines of the 2003-2008 period.

Pouches to be fastest growing product

Pouches, especially stand-up types, will post the fastest gains among all lawn, garden and agricultural packaging due to their superior visual appeal, reclosability and barrier properties. Demand for pouches will come largely at the expense of smaller paper and plastic bags. Bags and sacks will continue to be the leading product type through 2013, with demand advancing 1.5 percent per annum to just over $880 million. Gains will be driven by healthy advances for plastic types due to cost advantages relative to paper. Bags and sacks are widely used for lawn, garden and agricultural consumables because of their lower cost and lower material consumption than rigid containers, and good durability and protection. Plastic container demand is projected to increase 1.9 percent annually through 2013 to just over $380 million, bolstered by performance advantages such as design flexibility, light weight, water and chemical resistance, and suitability for a variety of closures. Their chemical resistance makes them especially amenable to packaging liquid chemicals such as pesticides, although these containers are also used in limited amounts for other items such as seeds and fertilizers.

US Lawn, Garden & Agricultural Packaging Demand, 2008
($1.6 billion)



IBCs to offer best prospects in bulk packaging

Demand for bulk packaging will increase less than one percent per year through 2013 to $242 million due to falling shipment volumes of fertilizers and meager advances in pesticide volumes. Intermediate bulk containers (IBCs) will offer the best prospects of all bulk packaging types as a result of long-term cost, reusability and performance advantages. IBCs also have larger capacities than drums, bags, sacks and bottles, allowing them to make further inroads in the agricultural and professional markets, where bulk quantities of consumables are primarily used.

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Sample Text, Table & Chart

SAMPLE TEXT

MARKETS

Bulk Packaging -- Bulk packaging demand in the agr
market will remain ... million, a sharp
to the pace of the 2 ... ated raw mate
combined with rob ... ricultural pest
worked to boost va ... demand will
ported by the wide ... ackaging for f
ented consumables ... sed in large q
order to accommoda ... acreage. Gains
will stem from supplantation of smaller-capacity drums, bags
bottles due to performance benefits, greater reusability, ease
and dispensing, and improved safety and efficiency. Further
for rigid IBCs (RIBCs) will be hindered by significantly high
costs and higher maintenance costs, especially with returnabl
In order to encourage adoption of the RIBC format, many fir
leasing or rental programs that enable customers to utilize th
without the considerable capital investment associated with purchasing.
Many RIBC producers also provide a variety of container management services, including collection, cleaning, reconditioning and disposal. Demand for flexible IBCs (FIBCs), also known as bulk bags, will be supported by their relatively low cost and versatility. FIBCs will also benefit from several key advantages compared to shipping sacks. For example, FIBCs are easier to handle and can be more efficiently transported and stored than larger numbers of individual bags and sacks.

Plastic drums will continue to supplant their fibre and steel counterparts based on continuing material improvements and the ability to contain a wide array of materials, except for solvent-based liquids and other substances that are incompatible with polyethylene. Moreover, plastic drums are lighter weight than steel drums and can be stored outside with rusting, which is a major benefit in the agricultural market because of the prevalence of outdoor storage. Overall value gains for plastic, steel and

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TABLE V-3

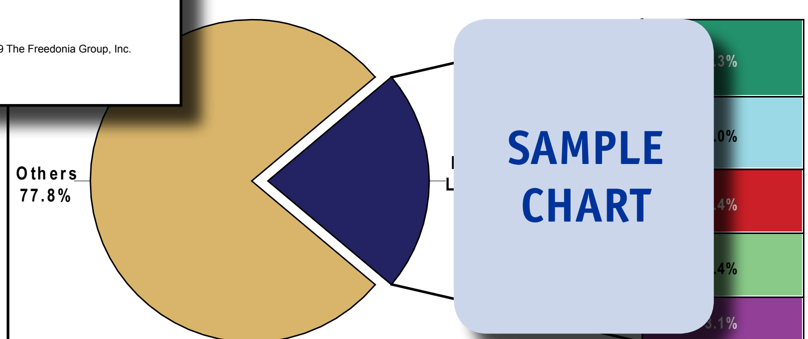
PLASTIC BAG & SACK DEMAND IN LAWN, GARDEN & AGRICULTURAL PACKAGING (million dollars)

SAMPLE TABLE

Item	1998	2003	2008	2013	2018
Bag & Sack Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]86
% plastic	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]5
Plastic Bag & Sack Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]7
By Application:					
Growing Media	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]8
Fertilizer	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]0
Seed	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]8
Mulch	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]9
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]2
By Market:					
Consumer	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]6
Agriculture	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]4
Professional	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]7
$/unit	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]6
Plastic Bags & Sacks (mil units)	812	886	885	990	1065

CHART VI-1

US LAWN, GARDEN & AGRICULTURAL PACKAGING MARKET SHARE, 2008 ($1.6 billion)



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Sample Profile, Table & Forecast

TABLE IV-3

FERTILIZER PACKAGING DEMAND
(million dollars)

Item	1998	2003	2008	2013	2018
Fertilizer Shipments	12[illegible]				[illegible]000
% packaged	[illegible]				[illegible].8
Packaged Fertilizer Shipments	3[illegible]				[illegible]90
$ pkg/$ fertilizer	[illegible]				[illegible]11
Fertilizer Packaging Demand					[illegible]96
Bags & Sacks					[illegible]50
Bulk Packaging					[illegible]90
Plastic Containers					[illegible]91
Pouches					[illegible]48
Other					[illegible]17
% fertilizer	[illegible]				[illegible].7
Lawn, Garden & Ag Pkg Demand	1044	1164	1600	1745	2010

SAMPLE TABLE

COMPANY PROFILES

Hoover Materials Handling Group Incorporated
2135 Highway Six South
Houston, TX 77077
281-870-8402
http://www.hooveribcs.com

Annual Sales:
Employment:

Key Products

SAMPLE PROFILE

Hoover [illegible] ld manufacturer of rigid intern[illegible] and dry products in the foo[illegible] The Company also is engaged in container leasing, tracking, recycling and disposal services. Hoover Materials Handling Group is owned by Court Square Capital Partners (New York, New York).

The Company is active in the US lawn, garden and agricultural packaging industry through the production of stainless steel, carbon steel, galvanized steel and polyethylene RIBCs. These products can be used to contain a number of solids and liquids, including agricultural and other chemicals.

Stainless steel RIBCs from Hoover Materials Handling Group are available under such brand names as LIQUITOTE, CARGO VALVE LIQUITOTE and LIQUISYSTEM. LIQUITOTE RIBCs, which are made with capacities ranging from 300 to 550 gallons, are marketed as alternatives to 55-gallon drums. Among other features, these refillable RIBCs are constructed with one-piece sloping bottoms engineered to provide almost complete drainage. CARGO VALVE LIQUITOTE

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"Bag and sack demand in fertilizer applications will fall slightly to $340 million in 2013, with declining fertilizer production contributing to losses. In addition, gains will be limited by a moderation in raw materials pricing after the sharp increases of the 2003-2008 period. Competition from pouches, particularly stand-up types, will also limit opportunities for smaller-sized fertilizer bags and sacks. Moreover, ..."
--Section IV, pg. 72

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Other Studies

Converted Flexible Packaging

This study analyzes the US converted flexible packaging industry. It presents historical demand data for the years 1998, 2003 and 2008, and forecasts for 2013 and 2018 by material (e.g., plastic film, paper, aluminum foil), product (e.g., bags, pouches), food packaging market (e.g., meats, baked goods, snack foods) and nonfood packaging market (e.g., pharmaceuticals, paper and textile products, chemicals). The study also considers market environment factors, evaluates company market share and profiles industry players.

#2558 .... 09/2009..................... $4900

World Converted Flexible Packaging

This study analyzes the world converted flexible packaging industry. It presents historical demand data (1998, 2003, 2008) and forecasts for 2013 and 2018 by material (e.g., polyethylene, polypropylene, PVC, polyester, nylon, polystyrene, cellophane, PVDC, EVOH, paper, foil), market, world region (e.g., North America, Asia/Pacific, Western Europe) and major national market. The study also considers market environment factors, evaluates company market share and profiles industry players.

#2556 .... 09/2009..................... $5600

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 $37.2 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

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

Lawn & Garden Consumables

US demand for packaged lawn and garden consumables will grow 4.5% yearly through 2012, as baby boomers enter their peak gardening years. Best prospects include value-added products such as fast-acting and easy-to-use fertilizer, rubber and colored mulches and premium growing media. This study analyzes the $7.5 billion US lawn and garden consumables industry, with forecasts for 2012 and 2017 by product, market, application, end user and region. It also details market share and profiles major players

#2337 .... 05/2008..................... $4600

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