INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

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World Converted Flexible Packaging

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

Study #2556 | September 2009 | $5600 | 363 pages

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World Converted Flexible Packaging

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

Table of Contents

World Converted Flexible Packaging

Industry Study with Forecasts for *2013 & 2018*

List of Tables/Charts

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

OVERVIEW

NORTH AMERICA

WESTERN EUROPE

ASIA/PACIFIC

OTHER REGIONS

INDUSTRY STRUCTURE

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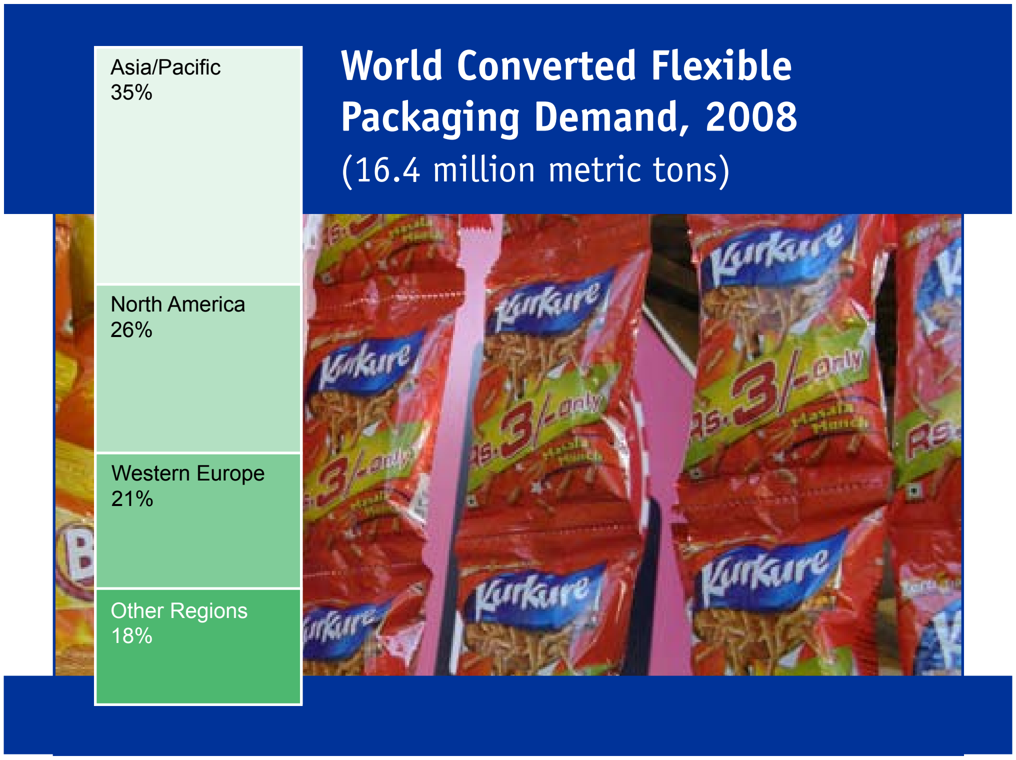
Cost, performance and source reduction advantages, coupled with high-barrier resins and value-added features, will continue to favor flexible packaging products over their rigid counterparts.

Global demand to increase 3.5% yearly through 2013

World demand for converted flexible packaging is forecast to increase 3.5 percent per year to over 19 million metric tons in 2013, faster than real (inflation-adjusted) gains in GDP. Factors contributing to rising demand will include growth in food and beverage production, which represents the largest market by far. In addition, cost, performance and source reduction advantages, as well as ongoing developments in high-barrier resins and value-added features, will continue to favor flexible packaging products over their rigid counterparts.



Environmental, cost advantages to benefit mature markets

However, gains will be limited by the mature state of the packaging industry in developed areas such as the US, Western Europe and Japan, where the main markets for flexible packaging (i.e., food, pharmaceuticals, cosmetics) are well-established. Material downgauging will also restrain volume gains. Nonetheless, demand for converted flexible packaging will benefit from the products' environmentally friendly image (as they are often associated with reduced packaging efforts), as well as cost advantages compared to rigid containers -- especially considering their lighter weight (which imparts transportation cost savings), their smaller size (which imparts storage space savings) and their lower energy requirements during production.

Developing regions to see fastest increases in demand

The fastest increases will occur in the world's developing regions. Asia, Latin America, Eastern Europe and the Africa/Mideast region will all outpace the global average. Population growth and greater urbanization (except in Eastern Europe), industrialization trends, and expanding international trade will support advances in these regions' generally underdeveloped packaging sectors. Rising consumer income levels and expanding middle-classes will also generate robust internal demand for packaged consumer goods like processed foods, beverages, pharmaceuticals, and cosmetics and toiletries, boosting converted flexible packaging consumption.

Some of the best gains are expected in China, which has surpassed Japan to become the world's second largest converted flexible packaging market (behind the US); and India, which will benefit from strong growth in domestic output and consumer product markets. Rapid gains are also expected in Russia and Indonesia, which will benefit from greater investment in state-of-the-art manufacturing equipment, resulting in improved product quality.

World Converted Flexible Packaging

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Sample Text, Table & Chart

TABLE VI-7

SOUTH KOREA CONVERTED FLEXIBLE PACKAGING DEMAND
(000 metric tons)

Item	1998	2003	2008	2013	2018
Population (million persons)					
$ GDP/capita					
Gross Domestic Product (bil 2007$)					
Food & Bev Mfg Val Added (bil 2007$)					
kg CFP/capita					
kg CFP/000$ GDP					
kg CFP/000$ food & beverages					
Converted Flexible Packaging Demand					
By Material:					
Polyethylene					
Polypropylene					
Other Plastics					
Paper & Foil					
By Market:					
Food					
Nonfood					
% South Korea					
Asia/Pacific CFP Demand	3510	4245	5770	7430	9900

SAMPLE TABLE

South Korea: Converted Flexible Packaging Deman

South Korea consumed 270,000 metric tons of converte packaging in 2008, or under five percent of the regional total many other countries in the region, South Korea's packaging is already well developed by international standards. Throug converted flexible packaging demand in South Korea is proje 000 metric tons, an improveme will be supported by continue n the nation's food and bever

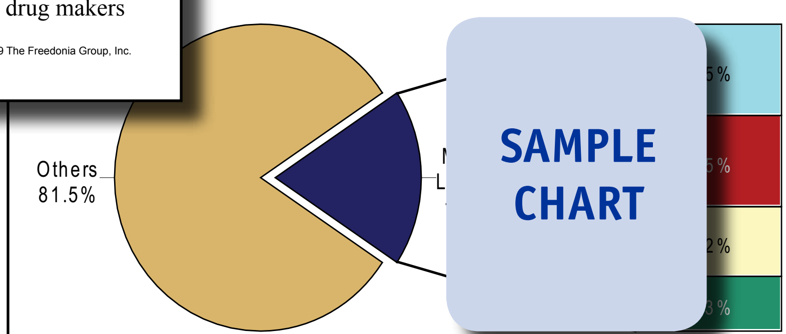
SAMPLE TEXT

environmentally friendly and o the forecast period. These igid containers, while at the sa limiting gains as manufacturers invest significant efforts in re overall packaging consumption. Increases in the ranks of the working classes in South Korea will promote demand for pac intensive prepared and convenience foods. Moreover, greate tion of Western-style retailing practices, including a heavier on brand name goods, is putting a premium on packaging ma marketing tool, including flexible packaging products.

Polyethylene and polypropylene will continue to surpass other packaging resins such as polystyrene and polyvinyl chloride. Polyethylene will benefit from growth in the country's food packaging industry along with greater consumer demand for items such as cleaning products, cosmetics and toiletries. Advances in converted flexible packaging are also expected in pharmaceutical applications, as South Korea will remain the third largest health care market in the developing Asia/Pacific region (after China and India), both in terms of health expenditures and medical product demand. Efforts by the government to hold down health spending inflation will promote the greater use of prescription drugs in patient treatment. In addition, the diversification of national drug makers

CHART VIII-1

RLD CONVERTED FLEXIBLE PACKAGING
MARKET SHARE, 2008
($54.3 billion)



SAMPLE CHART

World Converted Flexible Packaging

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

Sample Profile, Table & Forecast

TABLE III-3

WORLD POLYETHYLENE DEMAND IN CONVERTED FLEXIBLE PACKAGING BY REGION (000 metric tons)

Item	1998	2003	2008	2013	2018
World Converted Flexible Packaging	11[illegible]	[illegible]	[illegible]	[illegible]	[illegible]000
% polyethylene	[illegible]	[illegible]	[illegible]	[illegible]	[illegible].9
World Polyethylene in Flexible Pkg	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]20
North America:	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]30
United States	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]90
Canada & Mexico	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]40
Western Europe	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]20
Asia/Pacific:	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]45
China	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]60
Japan	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]50
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]35
Other Regions:	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]25
Latin America	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]20
Eastern Europe	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]00
Africa/Mideast	140	171	240	310	405

SAMPLE TABLE

COMPANY PROFILES

Chemosvit as
Sturova 101
059 21 Svit
Slovakia
421-52-715-1111-2
http://www.chemosvit.sk

Sales: $[illegible]y)
Employ[illegible]y)
Key Pro[illegible]m, monolayer films, laminate[illegible]

SAMPLE PROFILE

Che[illegible] products, fibers and fiber[illegible] and services. The privately[illegible]ubsidiaries.

The Company participates in the world converted flexible packaging industry through the operations of its Terichem AS joint venture and Chemosvit Folie AS subsidiary. These companies manufacture biaxially oriented polypropylene (BOPP) film and conduct converting operations. Terichem (Slovakia) is a joint venture between Chemosvit and AB Rani Plast Oy (Finland). Terichem produces BOPP films in thicknesses of three to 50 microns, and in coextruded and monolayer varieties. Specifically, coextruded films are sold under the TATRAFAN product line, which comprises heat sealable films with moisture and odor barrier properties for food packaging applications. The company also makes nontoxic BOPP wrapping films for end uses that include direct contact with food. Terichem maintains production facilities in Svit, Slovakia; and Luck, the Ukraine.

Chemosvit Folie (Slovakia) manufactures monolayer films, laminates, bags and pouches for such applications as packing confectionery

276

"World demand for polyethylene-based converted flexible packaging is projected to increase 3.6 percent per annum through 2013 to almost eight million metric tons, or 41 percent of the global total. This will remain the most broadly used converted flexible packaging material, based on the film's low cost and versatility. The increased availability of improved metallocene grades, which seal at lower temperatures, are stronger and enable downgauging, will also propel gains."
--Section III, pg. 42

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Other Studies

World Foodservice Disposables

This study analyzes the global foodservice disposables industry. It presents historical demand data for the years 1998, 2003 and 2008, and forecasts for 2013 and 2018 by product type (e.g., serviceware, packaging, napkins), market (e.g., eating and drinking places, retail stores and vending machines, institutional establishments), world geographic region and major national market. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2573 .... 11/2009..................... $5600

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), market (e.g., meats, baked goods, snack foods, pharmaceuticals, paper and textile products, chemicals), world region and for 20 countries. The study also considers market environment factors, evaluates company market share and profiles industry players.

#2558 .... 10/2009..................... $4900

Lawn, Garden & Agricultural Packaging

US lawn, garden and agricultural packaging demand will reach $1.7 billion in 2013. Consumer preferences for convenient, user-friendly packaging will benefit reclosable pouches, dispensing closures and other value-added types. Agriculture will remain the largest market while the consumer market grows the fastest. This study analyzes the US lawn, garden and agricultural packaging industry, with forecasts for 2013 and 2018 by market, application and product. It also evaluates market share and profiles industry players.

#2555 .... 09/2009..................... $4600

Meat, Poultry & Seafood Packaging

US demand for meat, poultry and seafood packaging is forecast to grow 3.5% yearly through 2013. Gains will be driven in part by the continuing shift to higher cost case-ready packaging by many retailers as a means to reduce in-store labor costs. Flexible packaging will outpace the larger rigid packaging segment. This study analyzes the $7.7 billion US meat packaging industry, with forecasts for 2013 and 2018 by technology and raw material, product, application and market. It also evaluates market share and profiles industry players.

#2522 .... 06/2009..................... $4700

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

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