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Converted Flexible Packaging

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

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Gains will be supported by cost and source reduction advantages over rigid packaging, and the need for value-added materials to enhance shelf life, product protection or ease of preparation.

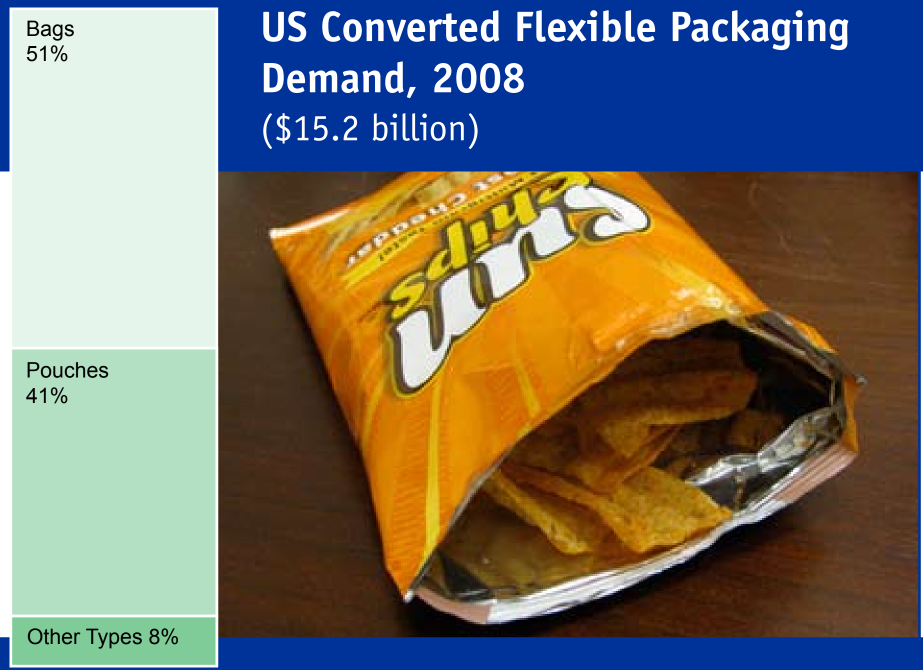
US demand to rise 3.5% annually through 2013

Demand for converted flexible packaging is projected to increase 3.4 percent per year through 2013. Growth in value will decelerate from the 2003-2008 performance as raw material price increases moderate. Nevertheless, gains will reflect an expected recovery in the US economy and will be supported by cost, performance and source reduction advantages over most rigid packaging formats. The need for value-added materials to enhance shelf life, product protection or convenience of preparation will also support advances. Converted flexible packaging's source reduction capabilities will be increasingly important as major retailers evaluate the environmental and material costs of the packaging used by their suppliers.

Pouches to be fastest growing product segment

Pouches will experience the fastest growth among converted flexible packaging products, with demand expected to increase 4.7 percent yearly to $7.9 billion in 2013. This will be a deceleration from the 2003-2008 period based on maturing markets and moderating material price increases. Nonetheless, source reduction, product differentiation and the presence of convenience features will drive solid growth for stand-up pouches, with relatively newer pouch types such as flat-bottomed, side-gusseted pouches and stick pouches also expected to fare well.

US Converted Flexible Packaging Demand, 2008
($15.2 billion)



Bag demand will increase more slowly, reflecting mature applications along with loss of share to pouches. Plastic bags will post faster gains than paper bags, based on lower cost and improved performance. More favorable prospects in food markets will be based on ongoing widespread uses with baked goods, meat products, produce, frozen food and grain mill products. In nonfood uses, plastic bags will continue to supplant multiwall paper bags in agricultural and horticultural, and chemical uses. Gains for other converted flexible packaging, primarily wrap products, will be slightly above-average, aided by heightened demand for specialized film packaging with meat products and opportunities for printed ream wrap.

Plastic film to see fastest material volume growth

Demand for primary materials is projected to increase 1.4 percent annually to 8.2 billion pounds in 2013, an acceleration from the 1993-2008 period. Plastic film is expected to experience faster volume growth due to performance and downgauging capabilities. Despite a modest decline, paper will benefit from ongoing demand in laminations with film and foil, along with a good environmental profile. Foil will face continued inroads by metallized films, but will maintain an important niche based on its high barrier properties and excellent aesthetics.

Converted Flexible Packaging

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Sample Text, Table & Chart

TABLE V-13

SNACK FOOD: CONVERTED FLEXIBLE PACKAGING DEMAND BY MATERIAL (million pounds)

Item	1998	2003	2008	2013	2018
Snack Food Shipments (bil 2000$)					
lbs pkg/000$ snack food					
Snack Food Flexible Pkg Demand					
Plastic Film:					
Polypropylene					
Polyethylene					
Polyester					
Other Films					
Paper:					
Glassine & Greaseproof					
Oiled & Waxed					
Aluminum Foil					

SAMPLE TABLE

NONFOOD PACKAGING

Converted Flexible Packaging Demand

Demand for converted flexible packaging in paper and t... product applications is forec... per ye... million in 2013. Gains will ... mand... and textile product shipmen... ance... tages of plastic and paper ba... wide... products, especially since m... not... barrier materials. Overall gr... conv... ible packaging average due to ... bags... and textile products. Also moderating gains will be competit... offshore-produced goods, especially in textiles, and the fact t... paper and textile products are marketed to industrial and inst... ers in packaging that uses minimal graphics to hold down overall product costs.

SAMPLE TEXT

Bags, primarily polyethylene and polypropylene types, are the dominant converted flexible packaging product in textile and paper product packaging, accounting for 77 percent of demand in 2008. Products range from small, clear bags for multipacks of socks to larger and more graphically intensive bags for items such as disposable diapers. Other bag applications include household tissue products such as toilet paper, paper towels and napkins; retail and foodservice paper cups, plates, containers and napkins; and paper-based hygiene products such as sanitary napkins, tampons and incontinence pads. Textile and apparel applications encompass shirts, underwear, hosiery, sheets, tablecloths and draperies. Bags have largely supplanted folding cartons or paper overwraps in many of these applications based on their lower cost, lighter weight, adequate protection and source reduction benefits. Compatibility with advanced graphics, which provides increased visual appeal in retail products, will be a further driver of growth for bags in paper and textile packaging. The popularity of multipack packaging for items such as paper towels and toilet paper will also support gains for larger, heavier bags.

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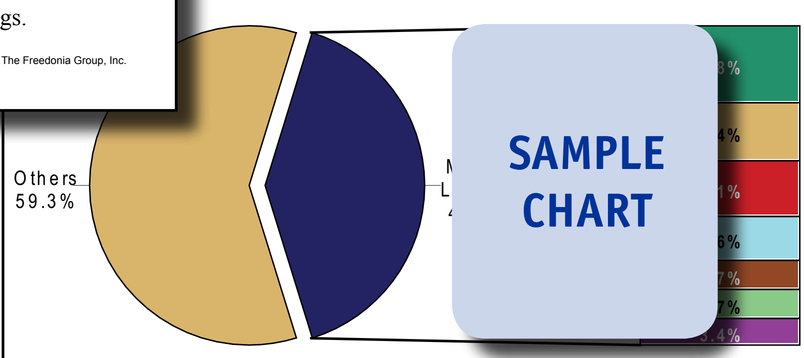
CHART VII-1

...TED FLEXIBLE PACKAGING MARKET SHARE, 2008 ($15.2 billion)



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Sample Profile, Table & Forecast

TABLE III-3

POLYETHYLENE FILM DEMAND IN CONVERTED FLEXIBLE PACKAGING BY TYPE & MARKET (million pounds)

Item	1998	2003	2008	2013	2018
Consumer Nondurables (bil 2000$)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
lbs film/000$ nondurables	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
PE Film Demand in Flexible Pkg	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Type:					
Low Density Polyethylene	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Linear Low Density PE	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Conventional LDPE	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
High Density Polyethylene	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Market:					
Food	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Nonfood	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% polyethylene	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Plastic Film in Converted Flex Pkg	[illegible]	[illegible]	[illegible]	[illegible]	6870

SAMPLE TABLE

COMPANY PROFILES

Coating Excellence International LLC
975 Broadway Street
Wrightstown, WI 54180
920-996-1900
http://www.coating-excellence.com

Annual Sales [illegible])
Employees: [illegible]

Key Products [illegible] woven bags

Coating [illegible] of converted flexible packa[illegible]factures flexible packaging fo[illegible]se packaging markets. In M[illegible]by Mason Wells (Milwaukee, Wisconsin), a private equity firm.

SAMPLE PROFILE

The Company is active in the US converted flexible packaging industry through the manufacture of ream wrap, films, pouches, wraps and woven bags. Ream wrap from Coating Excellence is marketed under the KRYSTAL-ICE WRAP, SHARKSKIN and TIDAL brand names. KRYSTAL-ICE WRAP is made from 100-percent recyclable polypropylene with heat-sealable properties and the Company's proprietary CLEAN STRIP easy-open tear strips. This light-weight wrap features ten-color flexographic printing. The Company's SHARKSKIN wraps are made from a recyclable combination of paper and film with high-gloss surfaces and high moisture barrier properties. These wraps also offer photo-quality printing and improved durability. Coating Excellence makes TIDAL ream wrap using polyethylene-coated paper with high strength and improved printing properties. This wrap is recyclable. Food packaging products from the Company include films,

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"Polyethylene film demand in converted flexible food packaging is forecast to expand 2.2 percent per year to 2.4 billion pounds in 2013 based on continued widespread use in diverse food markets such as baked goods, snacks, meat, produce and frozen food packaging. Gains will also be attributable to polyethylene's good barrier properties, suitability for downgauging and low cost compared to other films and paper, as well as demographic factors and shifts in food preferences stimulating demand for single-serve and smaller packaging sizes. Continued growth is anticipated for ..."
--Section III, pg. 54

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Other Studies

Microwave Packaging

This study analyzes the US microwave packaging industry. It presents historical demand data for the years 1998, 2003 and 2008, and forecasts for 2013 and 2018 by microwave packaging application (e.g., frozen food, snack food, shelf-stable meals, refrigerated/fresh foods) and packaging product (e.g., folding cartons, trays, bags, pouches, bowls and cups, sleeves). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry competitors.

#2572 .... 12/2009..................... $4700

World Converted Flexible Packaging

Global converted flexible packaging demand will grow 3.5% yearly through 2013. Gains will be driven in part by cost, performance and source reduction advantages over rigid packaging, and by ongoing developments in high barrier resins and value-added features. The fastest increases will occur in the world's developing regions. This study analyzes the 16.4 million metric ton world converted flexible packaging industry, with forecasts for 2013 and 2018 by material and market. It also evaluates market share and profiles industry players.

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

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

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

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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